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Climate change perceptions and actions survey: wave 4 survey outputs

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Climate change perceptions and actions survey: wave 4 survey outputs

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Glossary

Net Zero

Where the greenhouse gases taken from the atmosphere are in balance with the greenhouse gases emitted (Climate Action Wales Public Engagement Strategy 2023-26).

Climate Adaptation

Anticipating the risks and impacts arising from climate change and making sure we carry out the work required to ensure we are well prepared (Climate Action Wales Public Engagement Strategy 2023-26).

Nature Emergency

17% of 3,902 species studied in Wales are at risk of extinction, with many others in decline. Weather and temperature changes make it harder for many animals and plants to survive (Climate Action Wales).

1. Introduction

1.1 This report details the outputs from the fourth of six waves of the Climate Change Perceptions and Actions quantitative survey of households in Wales. The survey was commissioned by the Welsh Government to understand attitudes and behaviours related to reducing carbon emissions. This research will contribute to the Welsh Government's approach to behavioural and societal change and will inform future policy development and decisions in relation to decarbonisation.

1.2 The aims of the research are to be met through primary research with members of the public in Wales over 6 biannual waves, with a target of 1,000 responses per wave.

1.3 The Wave 1 Survey Outputs Report provides more detail on the background to the survey.

Questionnaire design

1.4 The questionnaire was developed by WSP, Accent and the Welsh Government.

1.5 The questionnaire was designed to allow for tracking of attitudes and behaviours in future waves and was structured to cover the following six areas:

- About you and your household
- Your perceptions and attitudes
- About your home energy
- Food
- Daily life
- Travel

1.6 The questionnaire was refined following both cognitive and pilot survey testing.

1.7 The final questionnaire used for Wave 4 is included in the Annex.

Fieldwork

1.8 The fieldwork for Wave 4 took place between Tuesday 18 February and Friday 14 March 2025.

1.9 1,001 surveys were completed, 735 online and 266 completed face-to-face on the doorstep. 22 surveys were completed in Welsh. The overall response rate (all completed surveys to postcards) was 5.6%.

Sample characteristics

1.10 Demographic characteristics of the sample were compared to national data sets for Wales, e.g. 2021 Census, to ensure the sample was representative of the wider population. Demographic questions covered age, gender, ethnicity, location, work status, occupation, household income, property type, and tenure.

1.11 Comparisons indicate that the sample is broadly representative of the population of Wales. The survey outputs are comparable to the outputs from national data sets for age, sex, ethnicity, work status, household income, and occupation. Small variations were observed between the survey data and national data sets for location, occupation, tenure, and property type.

Methodology report

1.12 The Wave 3 & 4 Methodology Report provides further detail on survey design, including comparison of the survey sample demographic characteristics against Census 2021 data and national data sets.

Approach to reporting and structure

1.13 This report presents the key outputs from the fourth of six planned survey waves. As such the outputs show the current position, with any notable differences in responses when disaggregating the sample noted. The report does not detail the responses to every question but presents a high-level summary of key outputs.

1.14 All outputs show non-weighted responses and therefore cannot be statistically taken to represent the population of Wales as a whole, but the respondents collectively are broadly representative of that population according to key demographic variables.

1.15 To ensure transparency about data quality, this report highlights the limitations of results drawn from small base sizes. Estimates based on fewer than 30 respondents are included in the tables but should be interpreted with caution, as such small samples can produce unstable percentages that may not reflect wider patterns. Following a commonly used statistical convention[1], subgroup results with bases under 30 are reported but flagged in the tables, and should not be over-interpreted.

[1] Kwak SG, Kim JH. Central limit theorem: the cornerstone of modern statistics. *Korean J Anesthesiol*. 2017;70(2):144-156. PubMed

1.16 A breakdown of the wave 4 demographic data, identifying relationships between the different demographic characteristics is included in Annex A – Wave 4 demographic data. The annex contains the following output:

- age by male and female
- age by area type
- occupation by area type
- income and age
- income and area type
- occupation and income
- tenure and area type
- tenure and income

1.17 The outputs presented in this report are a result of bi-variate analysis undertaken on the survey responses.

1.18 The analysis involved grouping the behaviours within the home energy, food, daily life, and travel sections of the survey according to their carbon impact (higher vs lower impact). An explanation for these categorisations can be found in each of the relevant sections of the report.

1.19 The waves are scheduled to alternate fieldwork between summer and winter, to capture any potential seasonal differences in responses. The Wave 4 Comparison Report shows changes in attitudes and behavioural responses across the first 4 waves.

1.20 The report is structured as follows.

- Section 2 – Perceptions and attitudes
- Section 3 – About your home
- Section 4 – Food
- Section 5 – Daily life
- Section 6 – Travel
- Section 7 – Conclusions

2. Perceptions and attitudes

2.1 This section of the report will discuss respondents' views on climate change.

Causes of climate change

2.2 Respondents were asked what they thought climate change was caused by. 43% of respondents said that they believed that climate change is caused mainly by human activity, with 13% saying that they believed that it is caused entirely by human activity (Table 2.1). Only 3% said they do not think climate change is happening, with 6% saying they believed it is caused entirely by natural processes.

Table 2.1 – Response to 'What do you think climate change is caused by?'

Concern	**All**
I don't think climate change is happening	3%
Entirely by natural processes	6%
Mainly by natural processes (but human activity also contributes)	15%
About equally by natural processes and human activity	21%
Mainly by human activity (but natural processes also contribute)	43%
Entirely by human activity	13%

Source: Climate Change Perceptions and Actions Survey, Wave 4 2025. Multiple choice. Questions asked of all. 'Not sure / Don't know' and 'Prefer not to say' excluded. Base = 958

Concern about climate change

2.3 Respondents were asked to rank on a scale of 1 to 10 (1 = not serious, 10 = extremely serious), whether they thought climate change was a serious problem right now. 32% of respondents chose either 9 or 10, and 78% chose 6 or above (Table 2.2). Only 7% of respondents chose 1 or 2.

Table 2.2 –Response to 'To what extent do you think climate change is a problem at this moment?'

Concern	**All**
1-2 Not serious	7%
3-5	15%
6-8	46%
9-10 Extremely serious	32%

Source: Climate Change Perceptions and Actions Survey, Wave 4 2025. Multiple choice. Questions asked of all. 'Not sure / Don't know' and 'Prefer not to say' excluded. Base = 965

2.4 Respondents were asked how worried they were personally about climate change. 22% of respondents said they were very worried about climate change, 47% said they were fairly worried, 19% said they were not very worried, and 12% said they were not at all worried (Table 2.3).

Table 2.3 –Response to 'How worried are you personally about climate change?'

Concern	**All**
Not at all worried	12%
Not very worried	19%
Fairly worried	47%
Very worried	22%

Source: Climate Change Perceptions and Actions Survey, Wave 4 2025. Multiple choice. Questions asked of all. 'Not sure / Don't know' and 'Prefer not to say' excluded. Base = 954

2.5 Aggregating the response categories into very / fairly worried and not very / not at all worried provides a simplified output. Responses have then been analysed by age. The majority of respondents across all age categories reported being 'fairly' or 'very' worried personally about climate change. The number of respondents in the 65+ age category reporting being 'not very' or 'not at all worried' was slightly higher (35%) than other age categories and the number of people in the 65+ reporting being ''very' or 'fairly' worried was lower than the other age categories (65%) (Table 2.4). This could suggest lower levels of personal concern amongst this age group.

Table 2.4 – Response to 'How worried are you personally about climate change?'

Concern	**All**	**18 to 34**	**35 to 44**	**45 to 54**	**55 to 64**	**65+**
Not very / Not at all worried	31%	27%	33%	29%	30%	35%
Very / Fairly worried	69%	73%	67%	71%	70%	65%

Source: Climate Change Perceptions and Actions Survey, Wave 4 2025. Multiple choice. Questions asked of all. 'Don't know' and 'Prefer not to say' excluded. Base = 949 (18 to 34 = 205, 35 to 44 = 166, 45 to 54 = 160, 55 to 64 = 182, 65+ = 236)

Responsibility for tackling climate change

2.6 Respondents were asked how responsible certain groups are for tackling climate change. The groups were the general public, local community, local council, businesses, the Welsh Government, the UK Government and countries outside the UK. Respondents were asked for each group whether they were highly responsible, somewhat responsible, not very responsible or not at all responsible.

2.7 Combining the response categories into highly / somewhat responsible and not very / not at all responsible provides a simplified output.

2.8 The proportion of highly / somewhat responsible responses can then be compared between groups (Table 2.5). A lower proportion of respondents said that their local

community (68%) and the general public (73%) were highly or somewhat responsible for tackling climate change in comparison to businesses (83%), the Welsh Government (84%) countries outside of the UK (86%) and the UK Government (87%).

2.9 The proportion of respondents aged 18 to 34 who said the general public (78%) and local community (72%) were 'highly / somewhat' responsible for addressing climate change, was higher than that for all other age groups. In general, the 18-34 age group reported 'highly/ somewhat' responsible for addressing climate change more frequently across all groups. Suggesting that the younger respondents consider that all groups have responsibility to tackle climate change.

Table 2.5 – Highly /somewhat responsible response by age to – 'To what extent do you believe the following are responsible for tackling climate change?'

Group	All	18 to 34	35 to 44	45 to 54	55 to 64	65+
General public	73%	78%	71%	72%	70%	71%
Local community	68%	72%	69%	70%	67%	61%
Your council	79%	83%	81%	78%	76%	75%
Businesses	83%	88%	84%	81%	84%	79%
Welsh Government	84%	88%	84%	83%	83%	79%
UK Government	87%	89%	87%	85%	89%	82%
Countries outside UK	86%	90%	86%	85%	88%	80%

Source: Climate Change Perceptions and Actions Survey, Wave 4 2025. Multiple choice. Questions asked of all. 'Don't know' and 'Prefer not to say' excluded from all responses. Base = 936 - 954 (for all respondents, numbers vary due to exclusion of 'Don't Know' and 'Prefer not to say')

2.10 By area type, a greater proportion of respondents who lived in the countryside or small village, thought that the general public (80%) were highly / somewhat responsible for tackling climate change, compared to respondents from other area types (69-74%) (Table 2.6). In contrast, a lower proportion of respondents who lived in the countryside or small village, thought that countries outside the UK (80%) were highly / somewhat responsible for tackling climate change, compared to respondents from other area types (86-90%).

Table 2.6 – Highly /somewhat responsible response by area type to - 'To what extent do you believe the following are responsible for tackling climate change?'

Group	All	Centre of a large city or town	Suburbs of a large city or town	Large village or small town	Countryside or small village
General public	73%	74%	72%	69%	80%
Local community	68%	75%	65%	66%	73%
Your council	79%	80%	81%	76%	81%
Businesses	83%	85%	83%	85%	79%
Welsh Government	84%	84%	84%	83%	83%
UK Government	87%	86%	86%	88%	84%
Countries outside UK	86%	90%	86%	88%	80%

Source: Climate Change Perceptions and Actions Survey, Wave 4 2025. Multiple choice. Questions asked of all. 'Don't know' and 'Prefer not to say' excluded from all responses. Base = 922 - 938 (for all respondents, numbers vary due to exclusion of 'Don't Know' and 'Prefer not to say')

Actions to address climate change

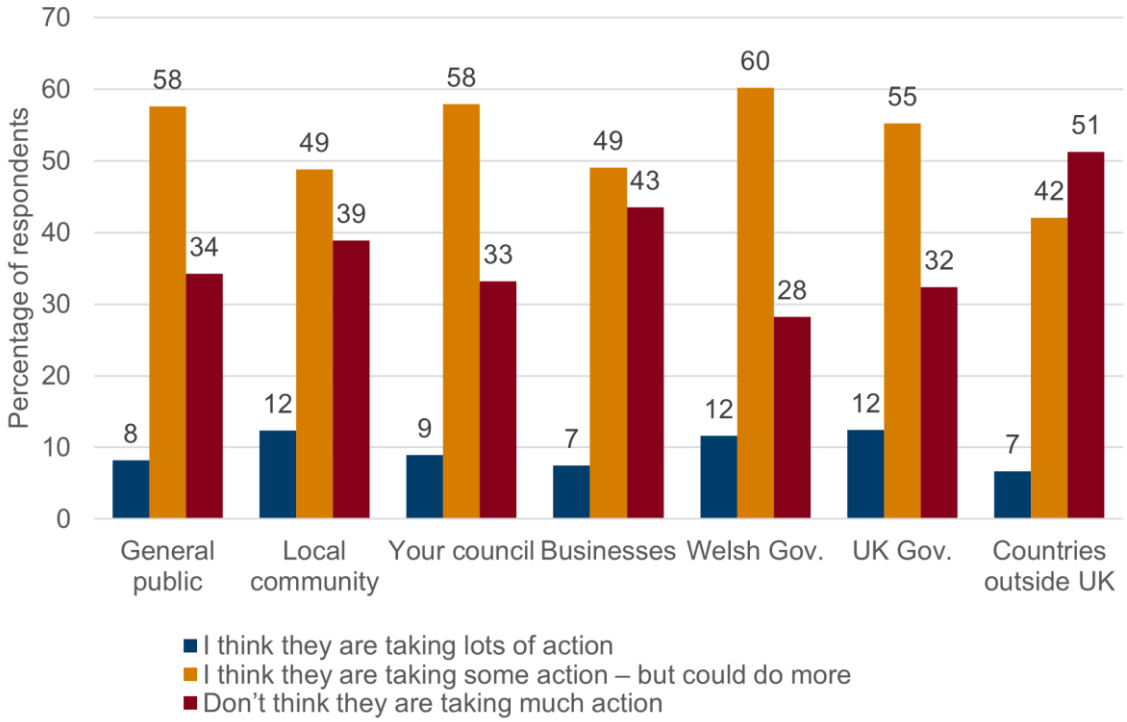
2.11 Respondents were then asked to what extent the groups were taking action to prevent climate change.

2.12 Across every group the majority of respondents reported either that they think 'some action is being taken, but more could be done' or they 'don't think that much action is being taken' (85-93%). Across every group only a small minority of respondents thought that a 'lot of action' was being taken to address climate change (7-12%) (Figure 2.1). The three groups which the highest proportion of respondents said were taking lots of action were local community (12%), Welsh Government (12%) and UK Government (12%).

2.13 'Countries outside of the UK' are the only group where the majority of respondents reported that they 'don't think that much action is being taken' (51%).

2.14 The other groups respondents most commonly reported that they 'don't think that much action is being taken' were businesses (43%) and the local community (39%).

Figure 2.1 – Response to – 'To what extent do you think the following are taking action to address climate change?'



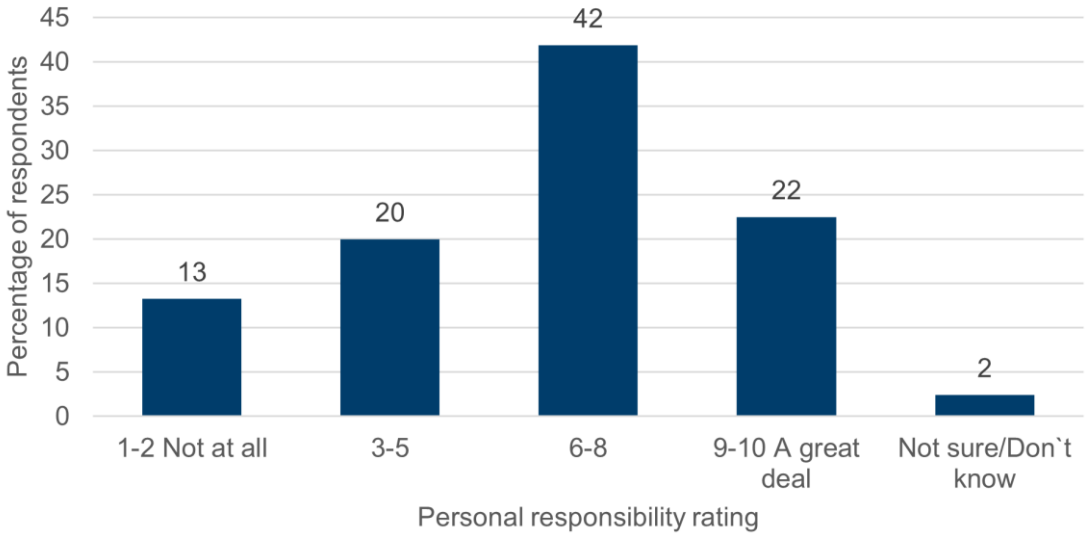
Description of Figure 2.1: a column chart showing to what extent respondents thought certain groups were taking action to address climate change.

Source: Climate Change Perceptions and Actions Survey, Wave 4 2025. Multiple choice. Questions asked of all. Don't know' and ''Prefer not to say' excluded from all responses. Base - General public = 929, Local community = 867, Your council = 919, Businesses = 899, Welsh Government = 915, UK Government = 927, Countries outside the UK = 868.

Personal responsibility and actions

2.15 Respondents were asked to rank from 1 (not at all) to 10 (a great deal) if they felt a personal responsibility for preventing climate change from worsening. The majority of respondents said they felt a high responsibility, 64% ranked 6 to 10, with 22% ranking 9 & 10 (Figure 2.2). Just 13% of respondents said they felt a low responsibility (rank 1 & 2).

Figure 2.2 – Response to – 'To what extent do you feel a personal responsibility to try to prevent climate change from worsening?'



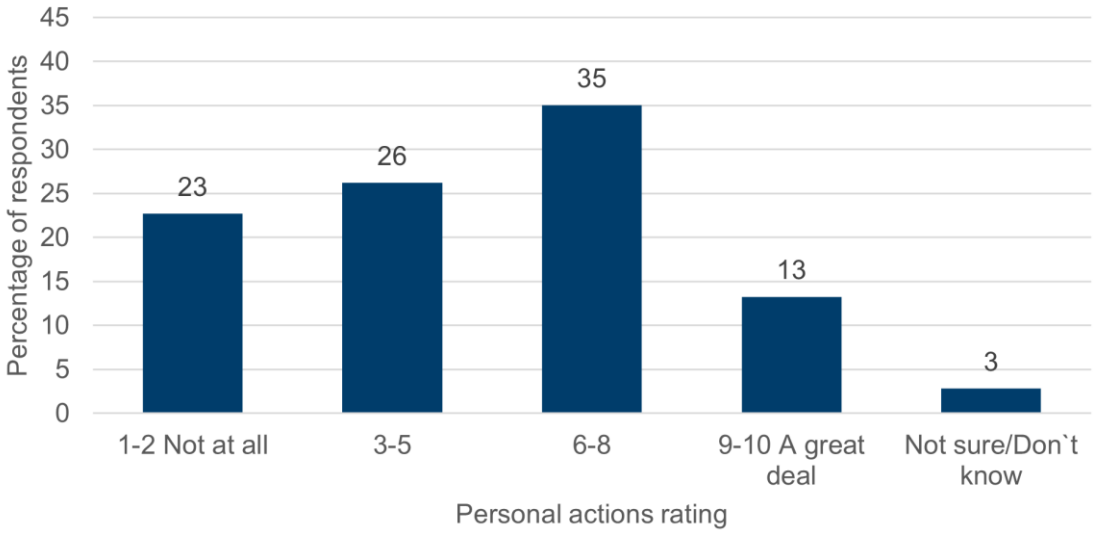
Description of Figure 2.2: a column chart showing to what extent respondents thought they had a responsibility to prevent climate change from worsening.

Source: Climate Change Perceptions and Actions Survey, Wave 4 2025. Multiple choice. Questions asked of all. 'Prefer not to say' excluded from all responses. Base = 996

2.16 Respondents were asked to rank from 1 (not at all) to 10 (a great deal) if they felt their personal actions could prevent climate change from worsening. Based on the assumption that those responding 6 to10 feel their actions could prevent climate change from worsening, 48% of respondents said they felt that their actions could prevent climate change from worsening, 35% responded 6 to 8 with 13% responding 9 & 10 (Figure 2.3).

2.17 23% responded 1 & 2, the assumption being that these respondents strongly felt that their actions could not prevent climate change from worsening.

Figure 2.3 – Response to – 'To what extent do you feel that your own personal actions can help prevent climate change from worsening?'

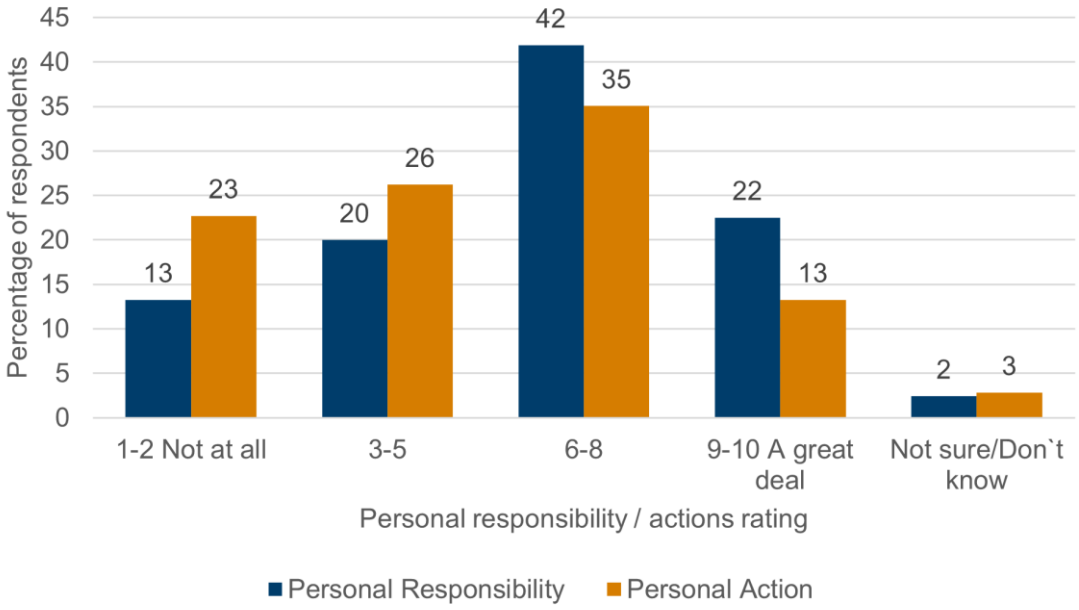


Description of Figure 2.3: a column chart showing to what extent respondents thought their personal actions could prevent climate change from worsening.

Source: Climate Change Perceptions and Actions Survey, Wave 4 2025. Multiple choice. Questions asked of all. 'Prefer not to say' excluded from all responses. Base = 996

2.18 A comparison of the responses to the question on personal responsibility and belief on personal actions shows a discrepancy between the extent to which people felt a personal responsibility to try to prevent climate change from worsening, and the extent to which people felt their own personal actions could help prevent climate change from worsening. 22% said they felt a high responsibility (rank 9 & 10) whereas only 13% said they felt strongly (rank 9 & 10) that their actions could prevent climate change from worsening (Figure 2.4).

Figure 2.4 – Response to – 'To what extent do you feel a personal responsibility to try to prevent climate change from worsening?' and 'To what extent do you feel that your own personal actions can help prevent climate change from worsening?'



Description of Figure 2.4: a column chart showing both to what extent respondents thought they had a responsibility to prevent climate change from worsening, and to what extent respondents thought they had a responsibility to prevent climate change from worsening.

Source: Climate Change Perceptions and Actions Survey, Wave 4 2025. Multiple choice. Questions asked of all. 'Prefer not to say' excluded from all responses. Base = 996

Knowledge

2.19 Respondents were asked about their knowledge of Net Zero. The majority of respondents (67%) said they knew a little or a fair amount about Net Zero. 20% of respondents said they knew nothing about Net Zero (Table 2.7).

2.20 Respondents were asked about their knowledge of Climate Adaptation. 27% said they knew nothing. However, the majority of respondents (63%) said they knew a little or a fair amount about Climate Adaptation (Table 2.7).

2.21 Respondents were asked about their knowledge of the Nature Emergency. 25% said they knew nothing and 63% said they knew a little or a fair amount about the Nature Emergency (Table 2.7).

Table 2.7 – Response to – 'How much do you know about the following?'

Response	Net Zero*	Climate Adaptation*	Nature Emergency*
I know nothing	20%	27%	25%
I know a little	40%	39%	41%
I know a fair amount	27%	24%	22%
I know a lot	12%	9%	10%
Prefer not to say	1%	1%	1%

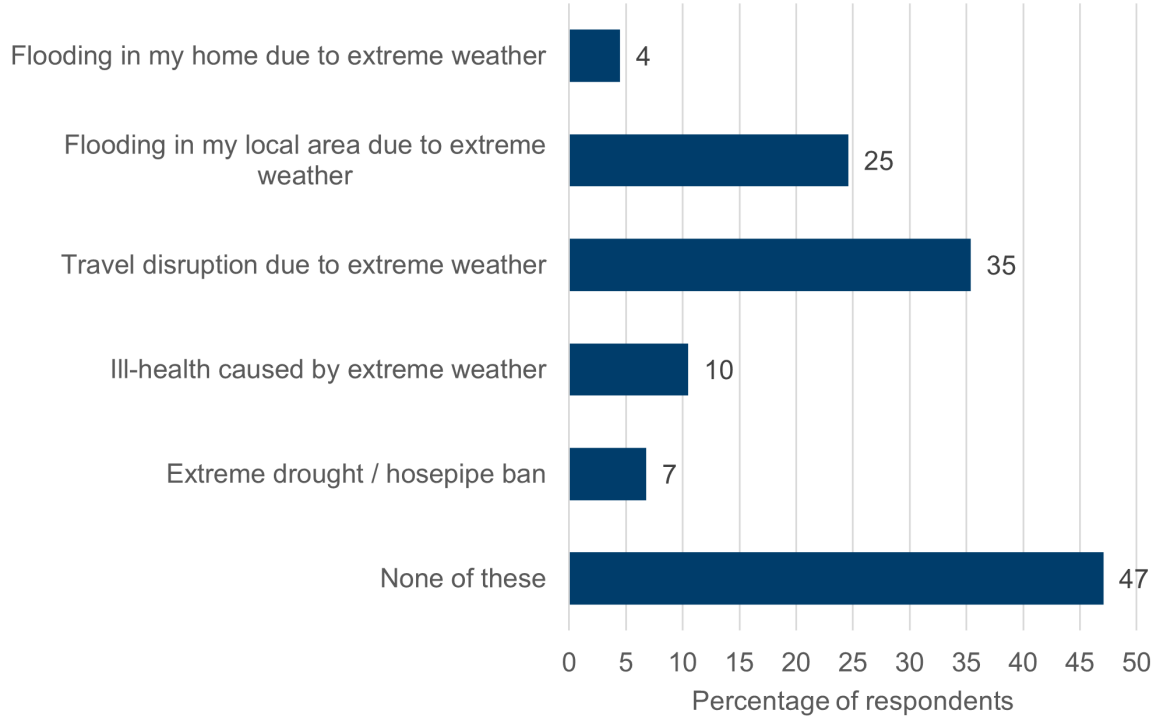
Source: Climate Change Perceptions and Actions Survey, Wave 4 2025. Multiple choice. Questions asked of all, no exclusions. Base = 1,001

*Definitions of each term were provided to respondents

Extreme weather

2.22 Respondents were asked if they had experienced any effect of extreme weather in the last five years. 47% of respondents had not experienced any extreme weather effects, 35% of respondents had experienced travel disruption and 25% of respondents had experienced flooding in their area (Figure 2.5).Respondents could choose multiple options when completing the survey.

Figure 2.5 – Response to – 'Have you experienced any of the following in the past five years?'



Description of Figure 2.5: a bar chart showing if respondents had experienced any effects of extreme weather in the last 5 years.

Source: Climate Change Perceptions and Actions Survey, Wave 4 2025. Multiple choice. Questions asked of all. 'Don't know' and 'Prefer not to say' excluded from chart. Base = 1,001

Perceptions and Attitudes: Summary

2.23 Respondents were asked about their views on climate change.

2.24 The majority of respondents agreed that the main cause of climate change was human activity, thought climate change was a problem and were worried about it. The number of people in the 65+ age category reporting being not very / not at all worried was slightly higher (35%) than other age categories. This could suggest lower levels of personal concern amongst this age group.

2.25 Younger respondents assigned higher levels of responsibility across most societal groups than other age groups. In general, the 18-34 age group reported 'high/ somewhat responsible for addressing climate change' more frequently across all groups. Suggesting that the younger respondents consider that all groups have responsibility to tackle climate change

2.26 Respondents thought that businesses and countries outside the UK were taking the least action of all the groups to tackle climate change.

2.27 Responses showed a gap between the extent to which people felt a personal responsibility to try to prevent climate change from worsening, and the extent to which people felt their own personal actions could help prevent climate change from worsening.

2.28 A large proportion of respondents reported knowing 'a little', or 'fair amount' about climate-related topics. Respondents had less knowledge of Climate Adaptation and Nature Emergency than they had about Net Zero across all three areas, few felt they knew a lot about each topic.

3. About your home

3.1 Respondents were asked about energy use within their home and energy saving actions being employed.

Energy use

3.2 66% of respondents indicated they had a smart meter in their household. However, only 40% of respondents indicated they use their smart meter (Table 3.1). 29% of respondents said they did not have a smart meter.

Table 3.1 – Response to – 'Do you have a smart meter in your home?'

Payment Method	All
I have a smart meter and I use the in-home display	40%
I have a smart meter but I don`t use the in-home display	14%
I have a smart meter but the in-home display isn't working	12%
I don`t have a smart meter	29%
Don`t know	3%
Prefer not to say	2%

Source: Climate Change Perceptions and Actions Survey, Wave 4 2025. Multiple choice. Questions asked of all. 'Don't know', 'Prefer not to say' and 'Other' included in 'All' response. Base = 1,001

Energy saving actions

3.3 Respondents were asked to indicate whether they had taken any of the listed steps / actions to save energy use.

3.4 The energy saving actions were categorised based on their impact on reducing carbon emissions. The higher impact behaviours tend to have a direct impact on heating and hot water, which are the largest consumers of home energy. On average, heating the home accounts for 61% of home energy use, and hot water 17% of home energy use[2][3]. Drying clothes outside or on an airer is also considered to be in the higher impact category as this reduces the use of tumble dryers. Tumble dryers are one of the most energy intensive household appliances, only behind electric showers in energy consumption[4]. Reduction of these behaviours can therefore have a high impact on carbon emissions.

3.5 The lower impact behaviours tend to have more modest impacts on home energy use, for example by indirectly reducing heating need by allowing sunlight in. The

[2] How different households use energy and how much it costs them Nesta
[3] Energy consumption in the UK 2024, Department of Energy Security and Net Zero Energy consumption in the UK 2024 - GOV.UK
[4] Energy Guide Which Appliances Use The Most Electricity? (2025)

most common energy saving behaviour is turning off lights not in use, yet lighting only accounts for only 3% of home energy consumption[23]. For appliances that are not in use or in standby mode, the power consumption is relatively small[5] but can build up if several devices are idle for a long time. It is important to note that 'lower impact' actions can still have a great impact if they are carried out frequently over a long time frame.

3.6 There were eight lower impact actions and six higher impact actions. The average number of lower impact actions undertaken per respondent was 4.6 (of 8), compared to 2.4 (of 6) for the higher impact actions.

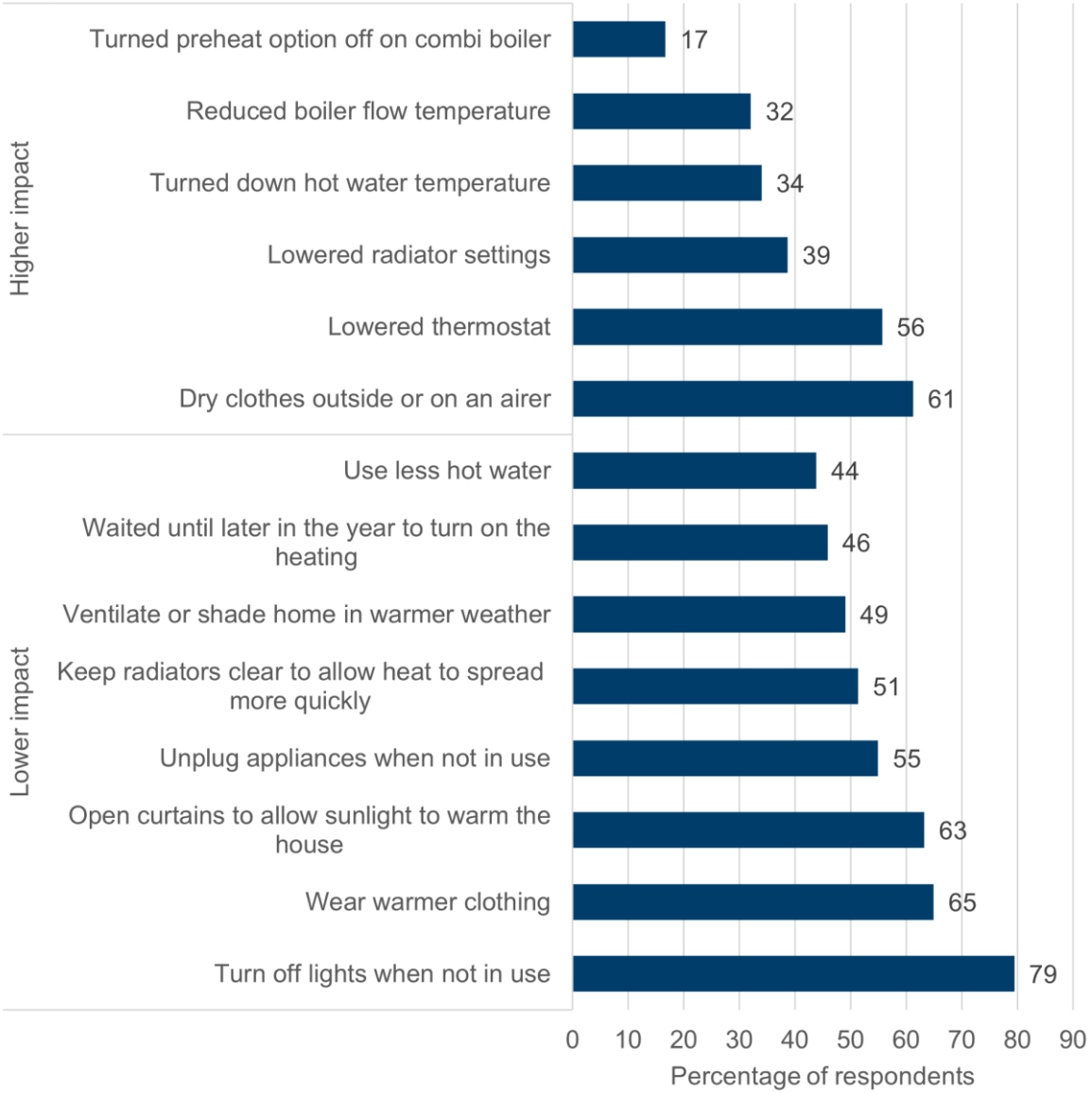
3.7 Of the lower impact actions, the most commonly undertaken were turning off the lights (79% of respondents did this), followed by wearing warmer clothing (65%) (Figure 3.1).

3.8 Of the higher impact actions, the most commonly undertaken were drying clothes outside or on an airer (61%) followed by lowering the thermostat (56%).

3.9 The least common actions taken were all higher impact actions. Turning down the hot water temperature (34%), reducing boiler flow temperature (32%) and turning off the preheat option on a combi boiler (17%).

[5] Framework for Phantom Load Management, Feasibility Report, Imperial College London

Figure 3.1 – Responses to – 'Have you taken any of the following steps to reduce your energy use?'



Description of Figure 3.1: a bar chart showing proportion of respondents undertaking household energy saving actions.

Source: Climate Change Perceptions and Actions Survey, Wave 4 2025. Multiple choice. Questions asked of all. 'Other', None of the above', Don't know' and 'Prefer not to say' excluded from Energy action response. Base = 1,001

3.10 Comparing responses by household income showed that among those who preferred not to give their household income, a lower proportion were employing energy saving actions compared to those who stated their household income.

3.11 The average number of actions undertaken by respondents who preferred not to state their household income was 1.6 (out of 6) for higher impact actions and 3.4 (out of 8) for lower impact actions (Table 3.2). The average number of actions undertaken by respondents who stated their household income was between 2.4

and 2.8 (out of 6) for higher impact actions and between 4.6 and 5.2 (out of 8) for lower impact actions

Table 3.2 – Response by household income to – 'Have you taken any of the following steps to reduce your energy use?'

Response	Higher Impact (average out of 6)	Lower Impact (average out of 8)
Up to £19,999	2.7	4.7
£20,000 to £49,999	2.4	4.6
£50,000+	2.8	5.2
Prefer not to say	1.6	3.4
All	2.4	4.6

Source: Climate Change Perceptions and Actions Survey, Wave 4 2025. Multiple choice. Questions asked of all. 'Other', None of the above', Don't know' and 'Prefer not to say' excluded from Energy action response, 'Don't know' excluded from Household income response. *Base = 891 (Up to £19,999 = 172, £20,000 to £49,999 = 427, £50,000+ = 206, Prefer not to say = 155)*.

3.12 Comparing the energy saving actions by the respondents' response to what they thought climate change was caused by, shows that the respondents who said climate change was caused entirely or mainly by human activity were undertaking a higher number of actions than all other respondents.

3.13 The average number of actions undertaken by respondents who said climate change is caused entirely or mainly by human activity was 2.7 (out of 6) for higher impact actions and 5.1 (out of 8) for lower impact actions (Table 3.3). For respondents who said climate change is caused entirely or mainly by natural processes the average number of actions was lower, 2.3 for higher impact, and 4.2 for lower impact.

Table 3.3 – Response by cause of climate change to – 'Have you taken any of the following steps to reduce your energy use?'

Response	Higher Impact (average out of 6)	Lower Impact (average out of 8)
I don't think climate change is happening	1.5*	3.0*
Entirely/mainly by natural processes	2.3	4.0
About equally by natural processes and human activity	2.1	4.2
Entirely / mainly by human activity	2.7	5.1
All	2.4	4.6

Source: Climate Change Perceptions and Actions Survey, Wave 4 2025. Multiple choice. Questions asked of all. 'Other', None of the above', Don't know' and 'Prefer not to say' excluded from Energy action response. Base = 958 (I don't think climate change is happening = 24, Entirely/mainly by natural processes= 198, About equally by natural processes and human activity = 201, Entirely / mainly by human activity= 535)

* Base size fewer than 30 respondents. Results should be interpreted with caution.

3.14 Comparing the energy saving actions by the respondents' response to how much they thought climate change was a problem, shows that the respondents who said climate change is a serious problem were undertaking more actions than those who thought it was not a serious problem.

3.15 The average number of actions undertaken by respondents who said climate change is a serious problem was 3.0 (out of 6) for higher impact actions and 5.6 (out of 8) for lower impact actions (Table 3.4). For respondents who said climate change is not a serious problem the average number of actions was lower, 1.7 for higher impact, and 3.1 for lower impact.

Table 3.4 – Response by extent of climate change as a problem to – 'Have you taken any of the following steps to reduce your energy use?'

Response	Higher Impact (average out of 6)	Lower Impact (average out of 8)
1-2 Not serious	1.7	3.1
3-5	2.1	4.1
6-8	2.2	4.3
9-10 Extremely serious	3.0	5.6
All	2.4	4.6

Source: Climate Change Perceptions and Actions Survey, Wave 4 2025. Multiple choice. Questions asked of all. 'Other', None of the above', Don't know' and 'Prefer not to say' excluded from Energy action response. Base = 965 (9-10 Extremely serious = 305, 6-8 = 442, 3-5 = 147, 1-2 Not serious = 71))

3.16 Comparing the energy saving actions by the respondents' response to how much they worry about climate change, shows that the respondents who were 'very' or 'fairly' worried about climate change were undertaking more actions than those who were not very or not at all worried.

3.17 The average number of actions undertaken by respondents who said they were 'very' or 'fairly' worried about climate change was 2.6 (out of 6) for higher impact actions and 5.0 (out of 8) for lower impact actions (Table 3.5). For respondents who said they were 'not very' or 'not at all' worried by climate change the average number of actions was lower, 2.0 for higher impact, and 3.9 for lower impact.

Table 3.5 – Response by worry about climate change to – 'Have you taken any of the following steps to reduce your energy use?'

Response	Higher Impact (average out of 6)	Lower Impact (average out of 8)
Not Very / Not at all worried	2.0	3.9
Very / Fairly worried	2.6	5.0
All	2.4	4.6

Source: Climate Change Perceptions and Actions Survey, Wave 4 2025. Multiple choice. Questions asked of all. 'Other', None of the above', Don't know' and 'Prefer not to say' excluded from Energy action response, 'Don't know' excluded from Household income response. Base = 954 (Not Very / Not at all worried = 295, Very / Fairly worried = 659).

Energy efficiency

3.18 Respondents were asked what energy efficient measures they had in their home.

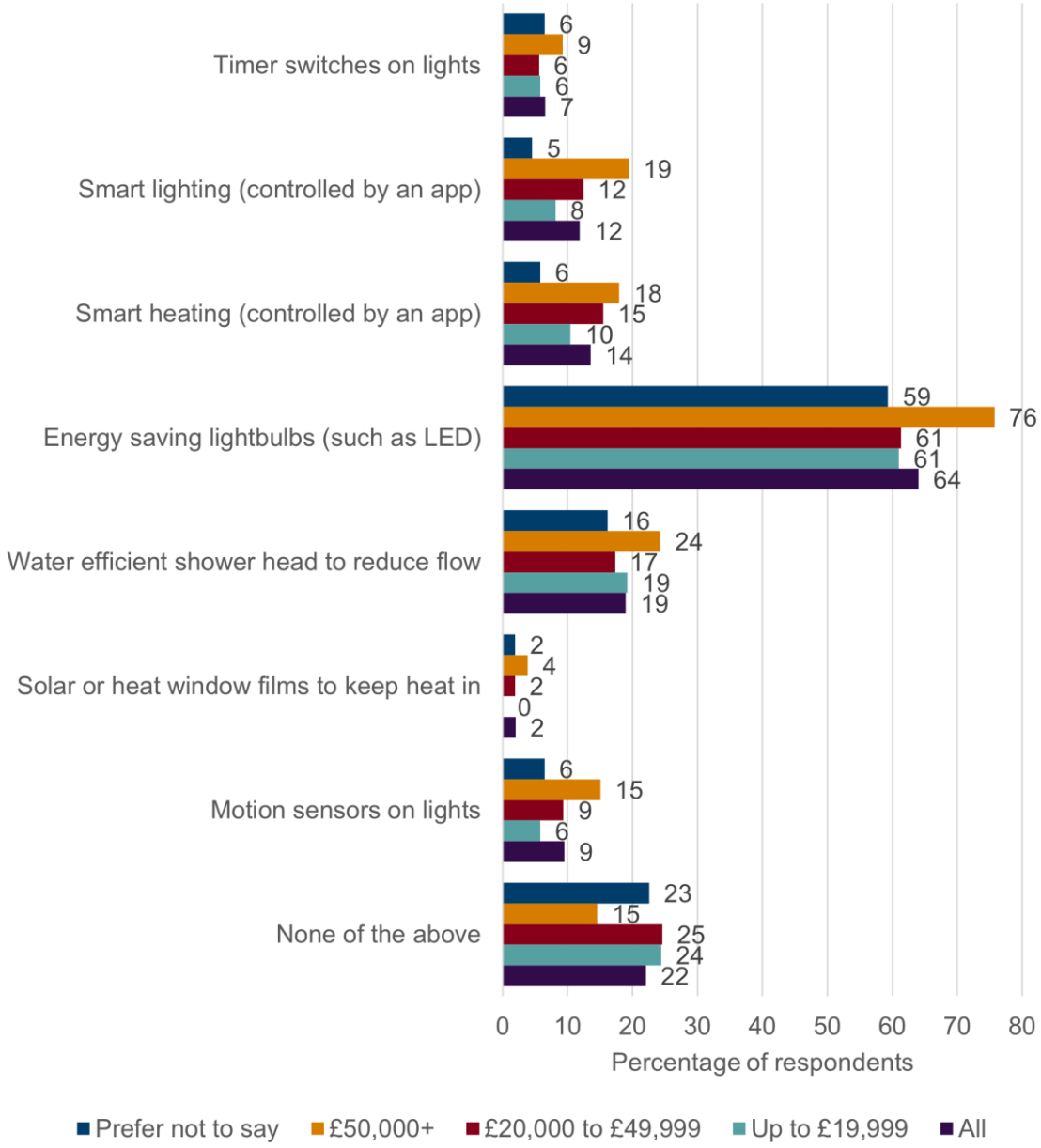
3.19 The most common energy efficient measures were energy saving light bulbs (64%) and water efficient shower head (19%).

3.20 The least common energy efficient measures were timer switches on lights (7%) and solar or heat window films (2%).

3.21 A greater proportion of respondents with household income of £50,000 or above had adopted all the energy efficient measures in their home compared to respondents with lower household incomes. For example, 18% of respondents whose household income was £50,000 or above had smart heating, compared to 10% of respondents whose household income was up to £19,999 (Figure 3.2). Similarly, 19% of respondents whose household income was £50,000 or above had smart lighting, compared to 8% of respondents whose household income was up to £19,999.

3.22 Respondents with lower household incomes were more likely to say they had none of the energy saving measures compared to respondents with the highest household income. 24% of respondents whose household income was up to £19,999 said they had none of the measures compared to 15% of respondents whose household income was £50,000 or above.

Figure 3.2 – Response by household income to – 'Below is a list of other energy efficiency measures. Which, if any, do you have in your home?'



Description of Figure 3.2: a clustered bar chart showing proportion of respondents by household income with energy efficiency measures.

Source: Climate Change Perceptions and Actions Survey, Wave 4 2025. Multiple choice. Questions asked of all. Don't know' and 'Prefer not to say' excluded from Energy action response, 'Don't know' excluded from Household income response. Base = 960 (Up to £19,999 = 172, £20,000 to £49,999 = 427, £50,000+ = 206, Prefer not to say = 155)

About Your Home Energy: Summary

3.23 Respondents were asked about energy use within the home and energy saving measures being employed.

3.24 66% of respondents indicated they had a smart meter in their household, but only 40% regularly used it.

3.25 Respondents who believe climate change is caused fully or partly by human activity, think climate change is a serious problem, or are worried about climate change, carry out more energy saving actions than other respondents.

3.26 A greater proportion of respondents with higher household incomes had energy efficient measures in their home than those with lower household incomes, especially smart lighting and heating measures.

4. Food

4.1 Respondents were asked about their personal and household food consumption.

Diet

4.2 Respondents were asked how often they consumed dairy products, red meat, white meat, fish / seafood, and fruit and vegetables. Respondents consumed fruit and vegetables (94% at least once per week) and dairy products (92% at least once per week) more frequently than white meat (84% at least once per week), red meat (66% at least once per week) and fish/seafood (59% at least once per week) (Table 4.1). The most common food types never consumed were fish/seafood (14% of respondents) and red meat (12% of respondents).

Table 4.1 – Response to – 'How many days a week do your usually eat each of the following things?'

Frequency	Dairy	Red Meat	White Meat	Fish / Seafood	Fruit / Vegetables
Every day	62%	4%	5%	1%	54%
5 to 6 days per week	14%	8%	13%	6%	17%
3 to 4 days per week	11%	19%	37%	14%	16%
1 to 2 days per week	5%	35%	29%	38%	7%
Less than once a week	3%	20%	7%	24%	3%
Never	2%	12%	8%	14%	0%
Don`t know	1%	1%	1%	1%	1%
Prefer not to say	1%	1%	1%	1%	1%

Source: Climate Change Perceptions and Actions Survey, Wave 4 2025. Multiple choice. Questions asked of all, no exclusions. Base = 1,001

4.3 Reducing consumption of red meat, white meat and dairy, choosing sustainable sources of fish / seafood, and increasing consumption of fruit and vegetables will have a positive impact on climate change by reducing carbon emissions[6].

4.4 These changes to dietary action can be classified based on their impact on reducing carbon emissions. The impact of these actions varies depending on how resource-intensive and carbon-heavy the food is in its production, particularly with regard to the carbon footprint of animal-based products compared to plant-based foods.

4.5 A reduction in consumption of red meat, dairy and white meat typically has a higher or medium-high (white meat) impact on reducing carbon emissions.

[6] Hannah Ritchie (2020) - "The carbon footprint of foods: are differences explained by the impacts of methane?" Our World in Data

4.6 A reduction in consumption of fish or seafood typically has a lower impact on carbon emissions. This is because fish and seafood are generally less carbon intensive than other animal proteins, yet there is variation in impact depending on the type of fish and seafood[7].

4.7 An increase in consumption of fruit and vegetables typically has a lower impact on carbon emissions as it does not directly indicate a reduction in the consumption carbon-intensive foods.

4.8 Respondents were asked if they had made any of five changes to their diet. The changes were reducing dairy, reducing red meat, reducing white meat, reducing fish and increasing fruit and vegetables.

4.9 The changes to diet that the greatest number of respondents said they had made were reducing red meat (37%) and eating more fruit and vegetables (34%) (Table 4.2).

4.10 Of respondents who said they climate change was an 'extremely serious' problem a greater proportion of them had made changes to their diet in comparison to respondents who said they thought climate change was 'not a serious' problem.

4.11 Of respondents who said they thought climate change was an 'extremely serious' problem 53% said they had reduced their red meat consumption, compared to 10% of respondents who thought climate change was not a serious problem (Table 4.2).

Table 4.2 – Response by extent of climate change as a problem to – 'Have you made any of the following changes to your diet?'

	Higher impact		Medium – High	Lower impact	
Response	**Reducing Dairy**	**Reducing Red Meat**	**Reducing White Meat**	**Reducing Fish / Seafood**	**Increasing Fruit / Vegetables**
1-2 Not serious	7%	10%	0%	3%	8%
3-5	13%	25%	11%	10%	24%
6-8	21%	33%	14%	12%	31%
9-10 Extremely serious	32%	53%	31%	25%	50%
All	22%	37%	18%	15%	34%

Source: Climate Change Perceptions and Actions Survey, Wave 4 2025. Multiple choice. Questions asked of all. Don't know' and 'Prefer not to say' excluded from climate change problem response. Base = 965 (9-10 Extremely serious = 305, 6-8 = 442, 3-5 = 147, 1-2 Not serious = 71)

[7] Eating seafood can reduce your carbon footprint, but some fish are better than others Oceana.

4.12 Comparing the changes to diet by the respondents' reported levels of worry about climate change, shows that the respondents who were very or fairly worried about climate change had made more changes to diet than those who were not very or not at all worried. Of respondents who said they were very / fairly worried about climate change a greater proportion of them had made changes to their diet in comparison to respondents who said they were not worried about climate change.

4.13 As an example, of respondents who were very / fairly worried about climate change 44% had reduced red meat consumption, compared to 22% of respondents who were not very / not at all worried (Table 4.3).

Table 4.3 – Response by worry about climate change to – 'Have you made any of the following changes to your diet?'

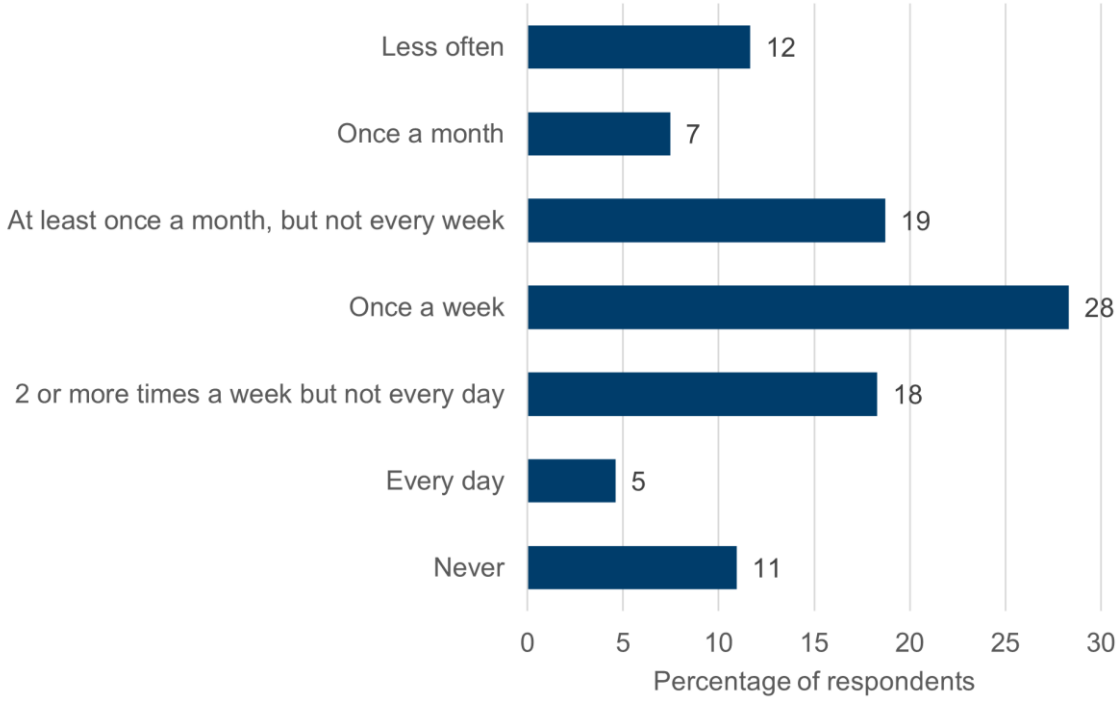
	Higher Impact		Medium – High	Lower impact	
Response	**Reducing Dairy**	**Reducing Red Meat**	**Reducing White Meat**	**Reducing Fish / Seafood**	**Increasing Fruit / Vegetables**
Not Very / Not at all worried	17%	22%	9%	8%	25%
Very / Fairly worried	25%	44%	22%	18%	39%
All	22%	37%	18%	15%	34%

Source: Climate Change Perceptions and Actions Survey, Wave 4 2025. Multiple choice. Questions asked of all. Don't know' and 'Prefer not to say' excluded from climate change problem response. Base = 954 (Not Very / Not at all worried = 295, Very / Fairly worried = 659)

Food waste

4.14 When asked how often they threw away food that had gone 'off' or had exceeded its expiry date, 51% of respondents said they did this at least once a week, and only 11% said they never do this. (Figure 4.1).

Figure 4.1 – Response to – 'How often in a typical week does your household need to throw away food that went off or went past its use by date?'



Description of Figure 4.1: a bar chart showing how often respondents throw away food that has gone past its use by date.

Source: Climate Change Perceptions and Actions Survey, Wave 4 2025. Multiple choice. Questions asked of all. 'Prefer not to say' excluded from response. Base = 978

Sustainable actions

4.15 Respondents were asked what sustainable actions they undertook when food shopping or cooking meals.

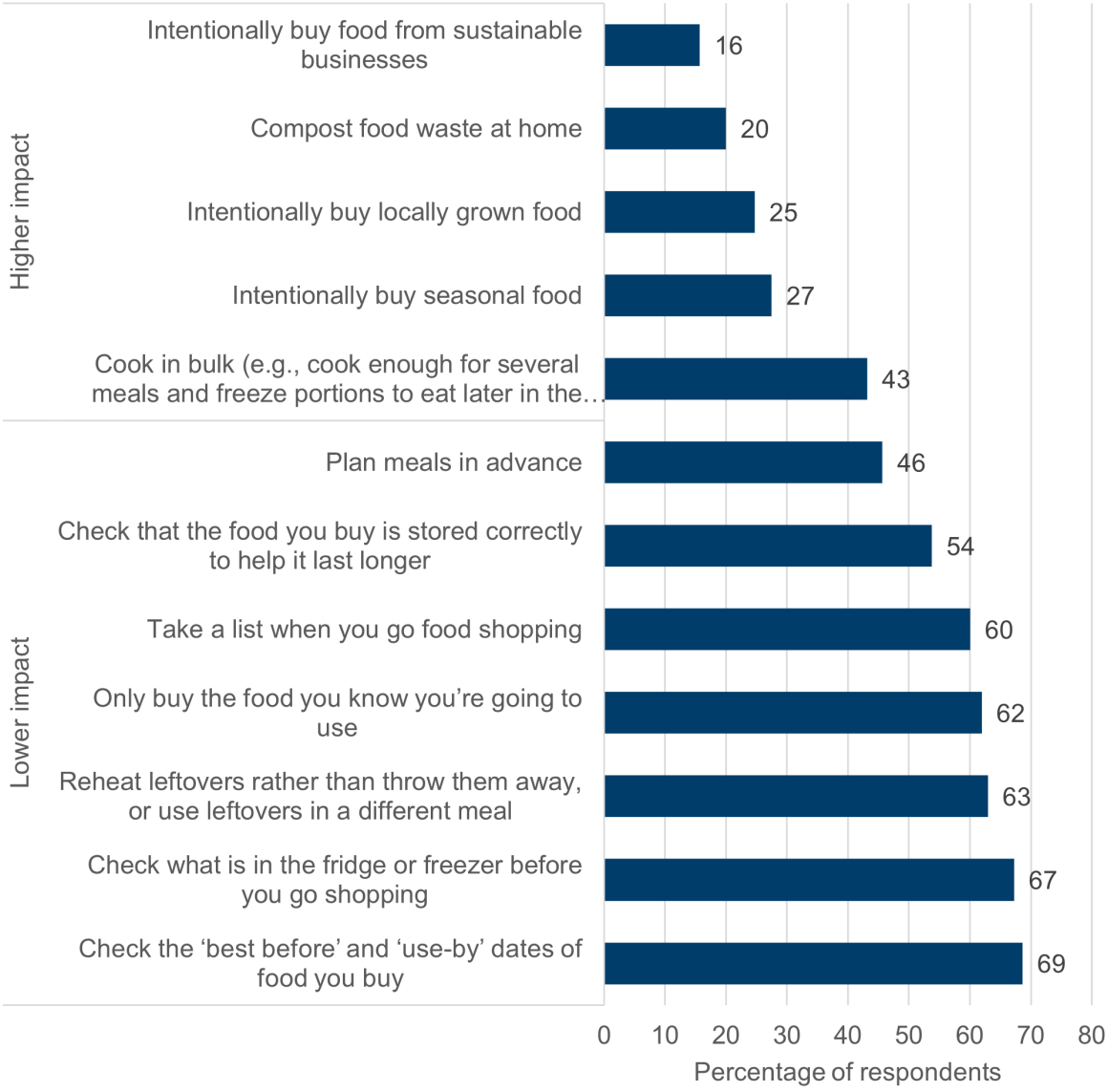
4.16 The sustainable actions were categorised based on their impact on reducing carbon emissions and were categorised into typically higher and lower impact actions. Respondents could choose more than one option.

4.17 Actions are categorised as higher impact if they have a direct impact on food systems (its production, transportation, distribution and consumption), whereas actions are categorised as lower impact if they are indirectly related to less food waste i.e. only indirectly related to the end-of-life of food.

4.18 Of the lower impact sustainable actions, the most common undertaken were check the 'best before' and 'use-by' dates of food you buy (69%), check what is in the fridge or freezer before you go shopping (67%) and reheat leftovers rather than throw them away, or use leftovers in a different meal (63%) (Figure 4.2).

4.19 Of the higher impact sustainable actions, the most common undertaken were cook in bulk (43%), intentionally buy seasonal food (27%) and intentionally buy locally grown food (25%).

Figure 4.2 – Response to – 'Do you do any of the following when food shopping or cooking meals?'



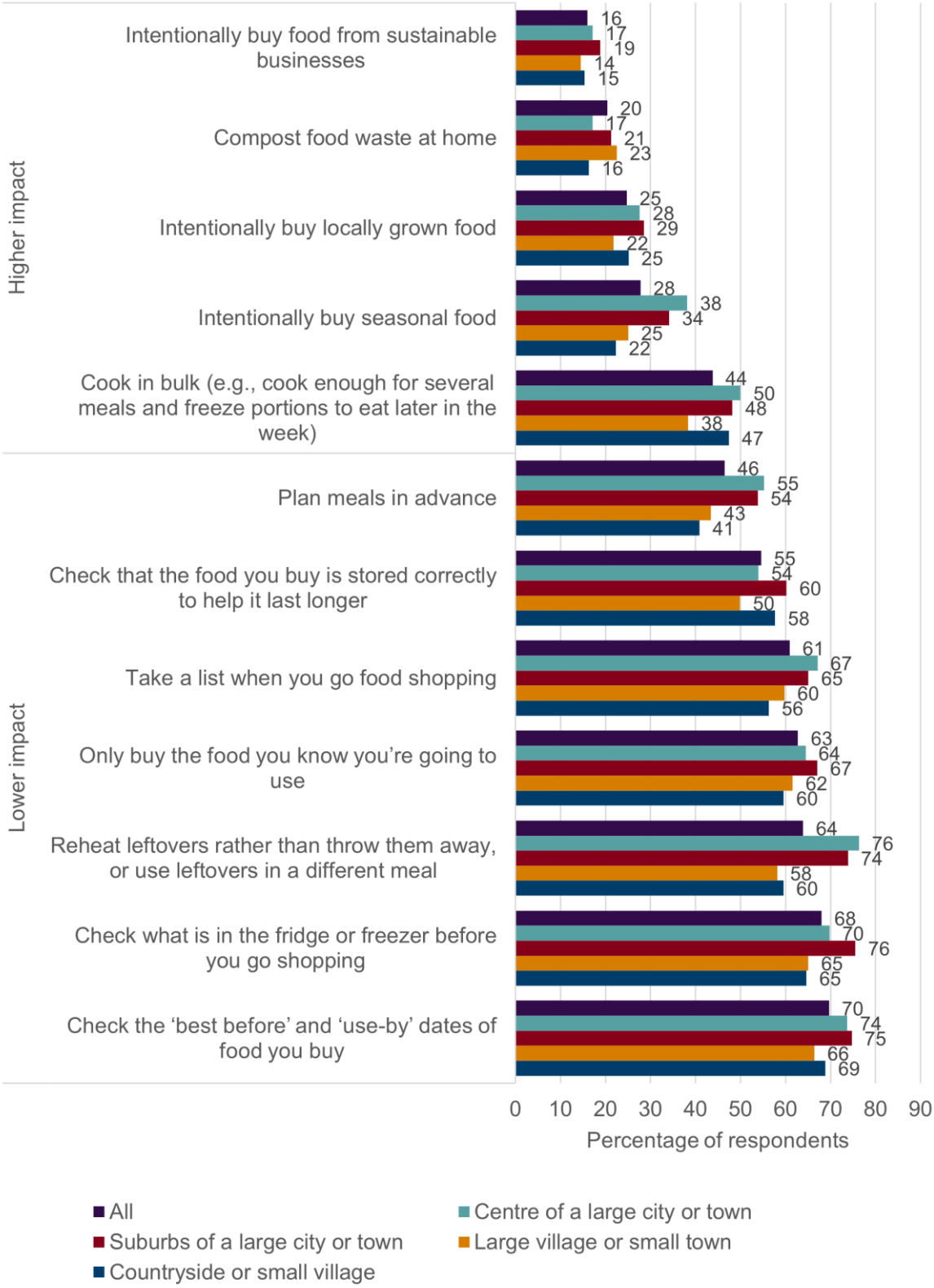
Description of Figure 4.2: a bar chart showing proportion of respondents undertaking sustainable actions when food shopping or cooking meals.

Source: Climate Change Perceptions and Actions Survey, Wave 4 2025. Multiple choice. Questions asked of all. Base = 1,001

4.20 The sustainable actions were further examined to identify variation by demographic or sample characteristic. The most notable variation was due to location. A larger proportion of respondents who lived in the centre of a large city or town, or in suburbs of large town or city undertook more of the sustainable actions in comparison to those living in other area types. These included intentionally buying

seasonal food (34-38% compared to 22-25% in the other two area types), planning meals in advance (54-55% compared to 41-43%), taking a shopping list (65-67% compared to 56-60%), reheating leftovers (74-76% compared to 58-60%), and checking the fridge or freezer before going shopping (70-76% compared to 65%) (Figure 4.3).

Figure 4.3 – Response by area type to – 'Do you do any of the following when food shopping or cooking meals?'



Description of Figure 4.3: a clustered bar chart showing proportion of respondents by area type undertaking sustainable actions when food shopping or cooking meals.

Source: Climate Change Perceptions and Actions Survey, Wave 4 2025. Multiple choice. Questions asked of all. 'Other' and Don't know' excluded from Sustainable practice action. Base = 975 (Suburbs = 249, Centre = 76, Large Village = 435, Countryside = 215)

4.21 Comparing the sustainable actions by the respondents' response to what they thought climate change was caused by, shows that the respondents who said climate change was caused entirely or mainly by human activity were undertaking a higher number of actions than all other respondents.

4.22 The average number of sustainable actions undertaken by respondents who said climate change is caused entirely or mainly by human activity was 1.5 (out of 5) for higher impact actions and 4.7 (out of 7) for lower impact actions (Table 4.4). For respondents who said climate change is caused entirely or mainly by natural processes the average number of actions was lower, 1.2 for higher impact, and 4.0 for lower impact.

Table 4.4 – Response by cause of climate change to - 'Do you do any of the following when food shopping or cooking meals?'

Response	Higher Impact (average out of 5)	Lower Impact (average out of 7)
I don't think climate change is happening	1.0*	3.8*
Entirely/mainly by natural processes	1.2	4.0
About equally by natural processes and human activity	1.2	3.7
Entirely / mainly by human activity	1.5	4.7
All	1.3	4.3

Source: Climate Change Perceptions and Actions Survey, Wave 4 2025. Multiple choice. Questions asked of all., None of the above' and 'Prefer not to say' excluded from sustainable action response. Base = 902 (I don't think climate change is happening = 24, Entirely/mainly by natural processes= 198, About equally by natural processes and human activity = 201, Entirely / mainly by human activity= 535)

* Base size fewer than 30 respondents. Results should be interpreted with caution.

4.23 Comparing the sustainable practices by the respondents' response to how much they thought climate change was a problem, shows that the respondents who said climate change is a 'serious' problem were undertaking more sustainable practices than those who thought it was not a serious problem.

4.24 The average number of actions undertaken by respondents who said climate change is a serious problem was 1.7 (out of 5) for higher impact actions and 5.1 (out of 7) for lower impact actions (Table 4.5). For respondents who said climate change is not a serious problem the average number of actions was lower, 0.9 for higher impact, and 3.5 for lower impact.

Table 4.5 – Response by extent of climate change as a problem to - 'Do you do any of the following when food shopping or cooking meals?'

Response	Higher Impact (average out of 5)	Lower Impact (average out of 7)
1-2 Not serious	0.9	3.5
3-5	0.9	3.8
6-8	1.3	4.0
9-10 Extremely serious	1.7	5.1
All	1.3	4.3

Source: Climate Change Perceptions and Actions Survey, Wave 4 2025. Multiple choice. Questions asked of all. None of the above' and 'Prefer not to say' excluded from sustainable action response response. Base = 965 (9-10 Extremely serious = 305, 6-8 = 442, 3-5 = 147, 1-2 Not serious = 71))

4.25 Comparing the sustainable actions by the level respondents' reported that they worry about climate change, shows that the respondents who were very or fairly worried about climate change were undertaking more sustainable actions when food shopping or cooking meals than those who are not very or not at all worried.

4.26 The average number of actions undertaken by respondents who said they were very or fairly worried about climate change was 1.5 (out of 5) for higher impact actions and 4.5 (out of 7) for lower impact actions (Table 4.6). For respondents who said they were not very or not at all worried by climate change the average number of actions was lower, 1.0 for higher impact, and 3.9 for lower impact.

Table 4.6 – Response by worry about climate change to - 'Do you do any of the following when food shopping or cooking meals?'

Response	Higher Impact (average out of 5)	Lower Impact (average out of 7)
Not Very / Not at all worried	1.0	3.9
Very / Fairly worried	1.5	4.5
All	1.3	4.3

Source: Climate Change Perceptions and Actions Survey, Wave 4 2025. Multiple choice. Questions asked of all. 'Other', None of the above', Don't know' and 'Prefer not to say' excluded from Energy step response, 'Don't know' excluded from Household income response. Base = 954 (Not Very / Not at all worried = 295, Very / Fairly worried = 659).

Food: Summary

4.27 Respondents were asked about their food consumption.

4.28 Fruit and Vegetables (95% at least once per week) and Dairy products (92% at least once per week) were the most frequently consumed food type by all respondents, with red meat (65% at least once per week) and fish/seafood (60% at least once per week) the least frequently consumed.

4.29 Those who believed climate change is a ‘serious’ problem and were ‘fairly’ or ‘very’ worried about climate change were more likely to make a change to their diet.

4.30 51% of respondents reported throwing away food that had gone off or exceeded its expiry date at least once a week. Only 11% said they never do this.

4.31 Respondents were asked about sustainable actions when shopping for food or cooking meals. Actions with a lower carbon impact like checking 'best before' dates and reheating leftovers were more common, while higher impact actions like composting food waste at home and buying seasonal food were less common.

4.32 Respondents who believed climate change is caused by human activity, thought it was a ‘serious’ problem and were ‘fairly’ or ‘very’ worried about it, were more likely to undertake sustainable food actions.

5. Daily Life Actions

5.1 Respondents were asked what sustainable actions they undertook in daily life. The sustainable actions were categorised based on their impact on reducing carbon emissions.

5.2 The higher impact daily life actions were those that reduced the need for demand for new products, thus avoiding the carbon emissions that are required to extract and process raw materials, and transport products to consumers[8]. Therefore, buying second-hand, repurposing items, fixing things, and renting/borrowing generally involve a shift towards a more sustainable circular economy[9].

5.3 The lower impact actions, whilst still reducing carbon emissions, do not avoid the creation of new products.

5.4 Of the higher impact sustainable actions, the most commonly undertaken were to donate or sell unwanted items (63%), fix things rather than buying new (55%), and buy second hand items (51%) (Figure 5.1).

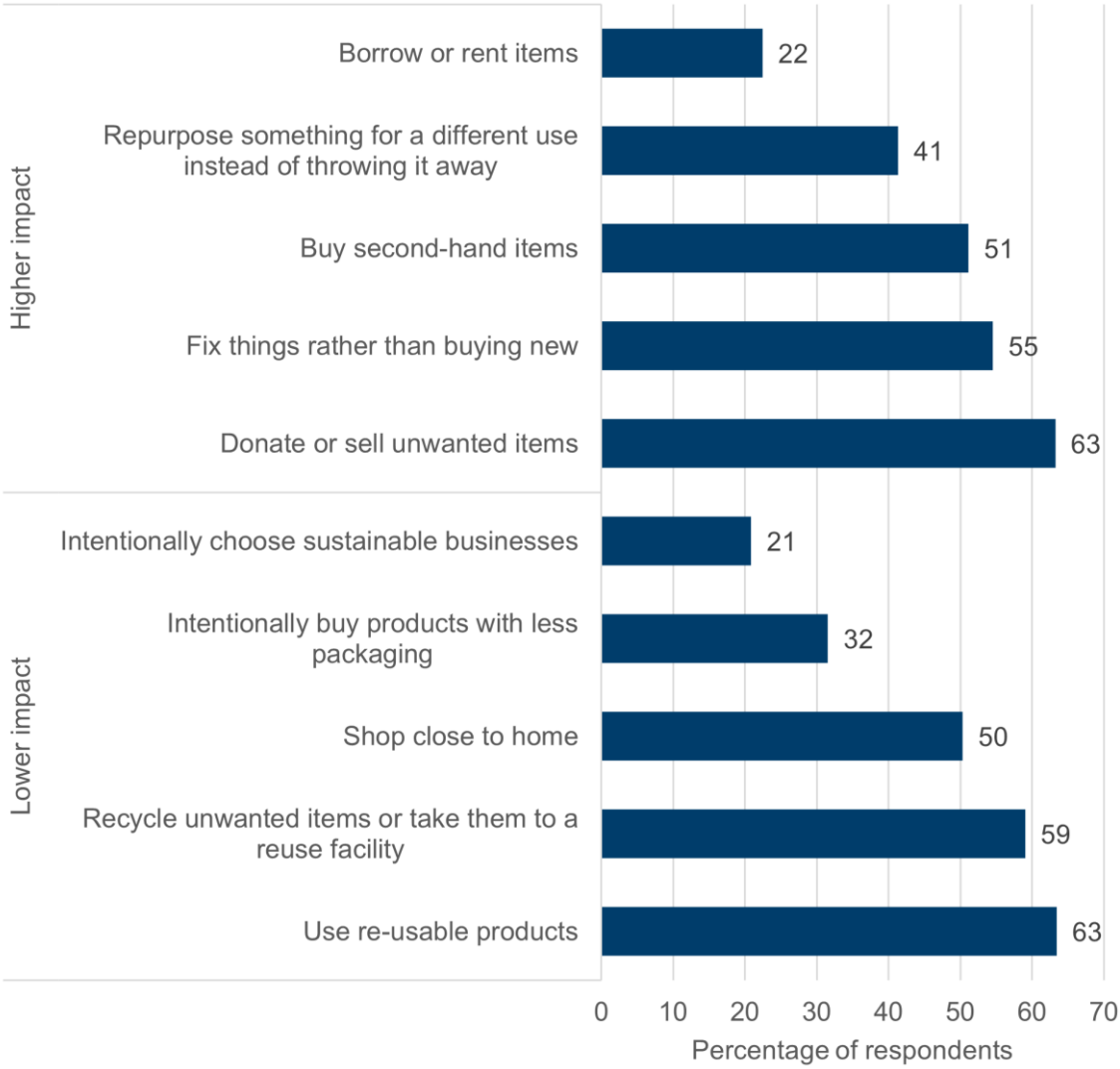
5.5 Of the lower impact sustainable actions, the most commonly undertaken were to use re-usable products (63%), recycle unwanted items (59%) and shop close to home (50%).

5.6 There is little distinction between the proportion of respondents undertaking lower impact actions and higher impact actions. The most common actions in each category are undertaken by relatively similar proportions of respondents.

[8] Reducing and Reusing Basics | US EPA

[9] Astrid Klooster, Blanca C. Bellostas, Marvin Henry,Li Shen Do We Save the Environment by Buying Second-Hand Clothes? The Environmental Impacts of Second-Hand Textile Fashion and the Influence of Consumer Choices Journal of Circular Economy

Figure 5.1 – Response to - 'Now we'd like to ask you about things you might do in your daily life. Please answer for yourself, not your household. Do you do any of the following?'

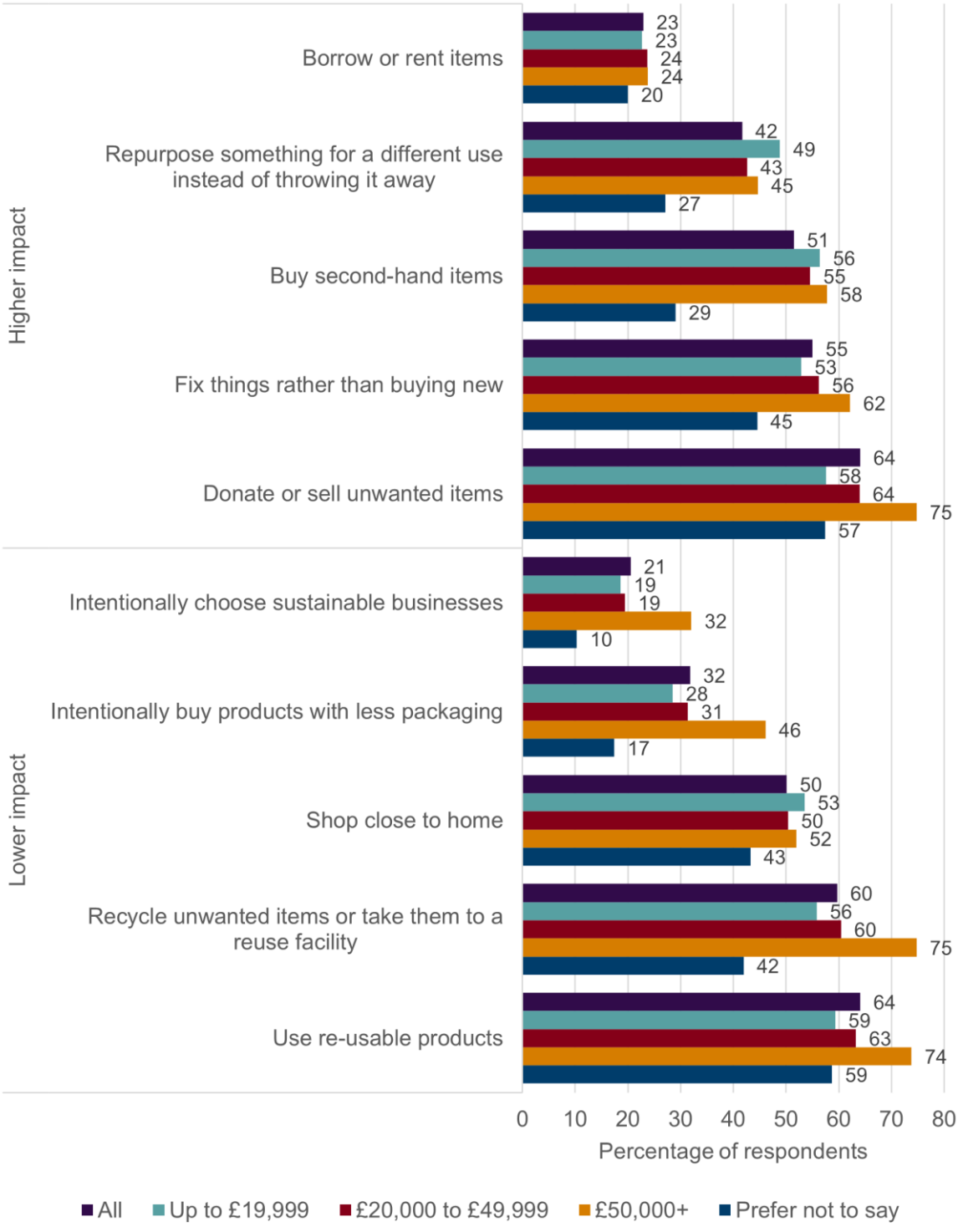


Description of Figure 5.1: a bar chart showing proportion of respondents undertaking sustainable actions in their daily life.

Source: Climate Change Perceptions and Actions Survey, Wave 4 2025. Multiple choice. Questions asked of all. 'Prefer not to say' and 'None of the above' excluded from sustainable action response. Base = 1,001

5.7 The response by income is shown in Figure 5.2. Respondents who preferred not to state their household income had the lowest response proportions for all categories apart from using reusable products. A greater proportion of respondents with the highest household income (greater than £50,000) reported undertaking sustainable actions than those with other household income, with the exception of shopping close to home and repurposing items.

Figure 5.2 – Response by household income to - 'Now we'd like to ask you about things you might do in your daily life. Please answer for yourself, not your household. Do you do any of the following?'

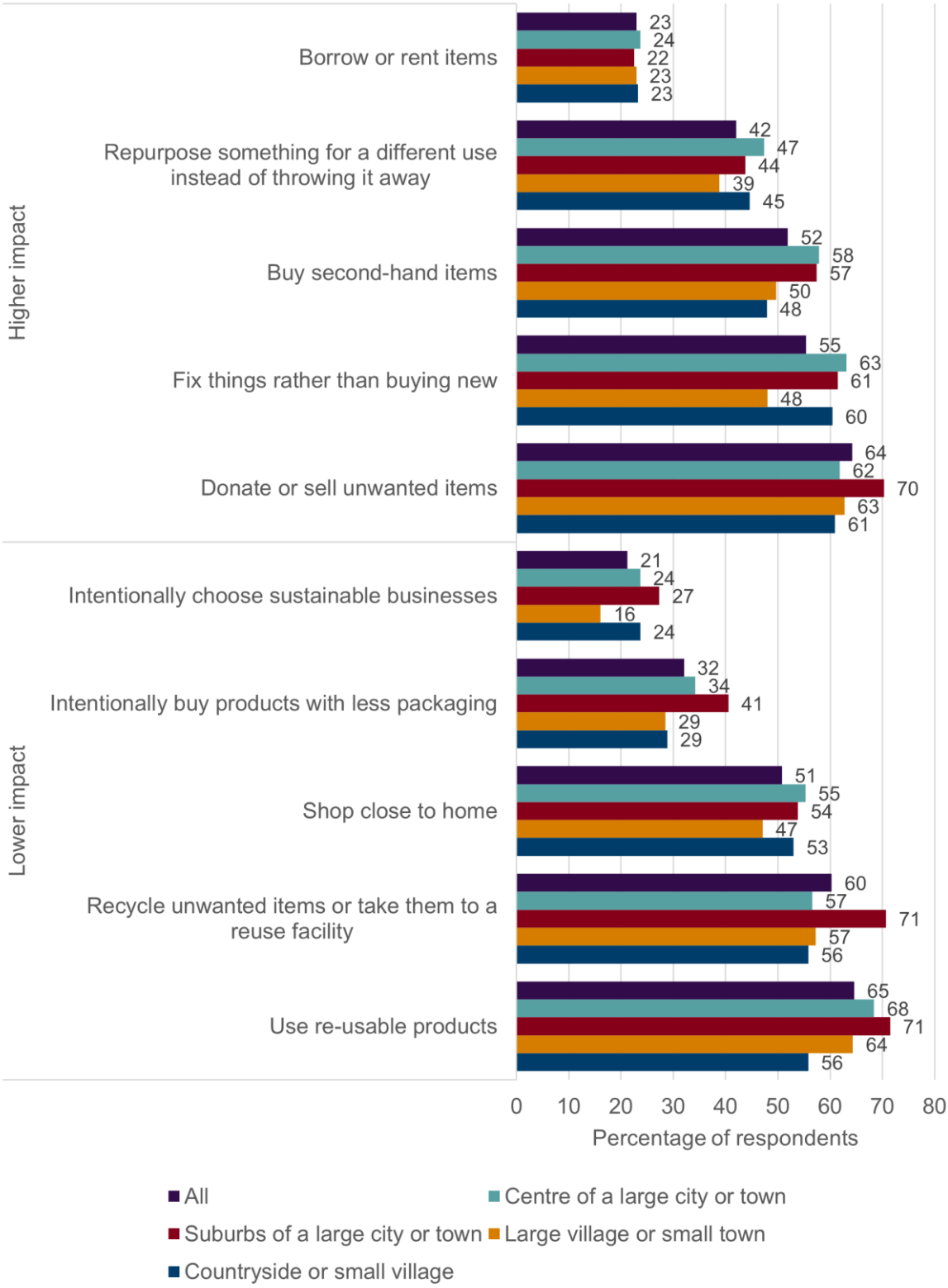


Description of Figure 5.2: a clustered bar chart showing proportion of respondents by household income undertaking sustainable actions in their daily life.

Source: Climate Change Perceptions and Actions Survey, Wave 4 2025. Multiple choice. Questions asked of all. 'Don't know' excluded from Household income response. Base = 960 (Up to £19,999 = 172, £20,000 to £49,999 = 427, £50,000+ = 206, Prefer not to say = 155)

5.8 A greater proportion of respondents who lived in the centre of a city or large town, or in the suburbs of a large city or town reported undertaking sustainable actions than respondents from other area types across the majority of actions.

Figure 5.3 – Response by area type to - 'Now we'd like to ask you about things you might do in your daily life. Please answer for yourself, not your household. Do you do any of the following?'



Description of Figure 5.3: a clustered bar chart showing proportion of respondents by area type undertaking sustainable actions in their daily life.

Source: Climate Change Perceptions and Actions Survey, Wave 4 2025. Multiple choice. Questions asked of all. 'Don't know' and 'Prefer not to say' excluded from area type response. Base = 975 (Suburbs = 249, Centre = 76, Large Village = 435, Countryside = 215)

5.9 Comparing the sustainable actions by the respondents' response to what they thought climate change was caused by, shows that the respondents who said climate change was caused 'entirely or mainly' by human activity were undertaking a slightly higher number of actions than all other respondents.

5.10 Respondents who said climate change is caused entirely or mainly by human activity was 2.6 (out of 5) for higher impact actions, and 2.6 (out of 5) for lower impact actions (Table 6.7). For respondents who said climate change is caused entirely or mainly by natural processes the average number of actions was lower, 2.1 for higher impact, and 1.9 for lower impact. The sample size of respondents who said they didn't think climate change was happening was too small to be considered for comparison.

Table 5.1 – Response by cause of climate change to - 'Now we'd like to ask you about things you might do in your daily life. Please answer for yourself, not your household. Do you do any of the following?'

Response	Higher Impact (average out of 5)	Lower Impact (average out of 5)
I don't think climate change is happening	1.6*	1.4*
Entirely/mainly by natural processes	2.1	1.9
About equally by natural processes and human activity	2.2	1.9
Entirely / mainly by human activity	2.6	2.6
All	2.4	2.3

Source: Climate Change Perceptions and Actions Survey, Wave 4 2025. Multiple choice. Questions asked of all., None of the above' and 'Prefer not to say' excluded from sustainable action response. Base = 958 (I don't think climate change is happening = 24, Entirely/mainly by natural processes= 198, About equally by natural processes and human activity = 201, Entirely / mainly by human activity= 535)

* Base size fewer than 30 respondents. Results should be interpreted with caution.

5.11 Comparing the sustainable actions by the respondents' response to how much they thought climate change was a problem, shows that the respondents who said climate change is a 'serious' problem were undertaking more sustainable actions than those who thought it was 'not a serious' problem.

5.12 The average number of actions undertaken by respondents who said climate change is an 'extremely serious' problem was 2.9 (out of 5) for higher impact actions and 3.0 (out of 5) for lower impact actions (Table 5.2). For respondents who

said climate change is not a serious problem the average number of actions was lower, 1.7 for higher impact, and 1.4 for lower impact.

Table 5.2 – Response by extent of climate change as a problem to -'Now we'd like to ask you about things you might do in your daily life. Please answer for yourself, not your household. Do you do any of the following?'

Response	Higher Impact (average out of 5)	Lower Impact (average out of 5)
1-2 Not serious	1.7	1.4
3-5	1.9	1.7
6-8	2.3	2.1
9-10 Extremely serious	2.9	3.0
All	2.4	2.3

Source: Climate Change Perceptions and Actions Survey, Wave 4 2025. Multiple choice. Questions asked of all. None of the above' and 'Prefer not to say' excluded from sustainable action response. Base = 965 (9-10 Extremely serious = 305, 6-8 = 442, 3-5 = 147, 1-2 Not serious = 71))

5.13 Comparing the sustainable actions by the level respondents' reported they worry about climate change, shows that the respondents who were very or fairly worried about climate change were undertaking more sustainable actions than those who are not very or not at all worried.

5.14 The average number of actions undertaken by respondents who said they were very or fairly worried about climate change was 2.6 (out of 5) for higher impact actions and 2.6 (out of 5) for lower impact actions (Table 5.3). For respondents who said they were not very or not at all worried by climate change the average number of actions was lower, 2.0 for higher impact, and 1.7 for lower impact.

Table 5.3 – Response by worry about climate change to - 'Now we'd like to ask you about things you might do in your daily life. Please answer for yourself, not your household. Do you do any of the following?'

Response	Higher Impact (average out of 5)	Lower Impact (average out of 7)
Not Very / Not at all worried	2.0	1.7
Very / Fairly worried	2.6	2.6
All	2.4	2.3

Source: Climate Change Perceptions and Actions Survey, Wave 4 2025. Multiple choice. Questions asked of all. 'Other', None of the above', Don't know' and 'Prefer not to say' excluded from sustainable action response. Base = 954 (Not Very / Not at all worried = 295, Very / Fairly worried = 659).

Daily Life: Summary

5.15 Respondents were asked what sustainable actions they undertook in daily life.

5.16 The three most common actions for all respondents were donating or selling unwanted items, using reusable products, and recycling unwanted items.

5.17 For almost all of the sustainable actions, a greater proportion of respondents with higher household income were undertaking them in comparison to those with lower household income. Respondents who preferred not to state their household income had the lowest response proportions for all sustainable actions.

5.18 A greater proportion of respondents living in the centre of a city or large town, or in suburbs of a large city or town stated that they undertook more sustainable actions compared to those living in other area types across the majority of actions.

5.19 respondents who believed climate change was caused by ‘mainly or entirely by human activity’, thought it was a ‘serious’ problem, and were ‘fairly’ or ‘very’ worried about it, stated that they undertook more sustainable actions than other respondents.

6. Travel

6.1 Respondents were asked about travel behaviour.

Vehicle availability

6.2 Respondents were asked how many vehicles their household regularly had access to. 51% of households had access to one car, 24% of households had access to two cars, and 19% of households did not have access to a car.

6.3 42% of respondents with a household income of up to £19,999 did not have access to a car, compared to 5% of respondents whose household income was £50,000 or above (Table 6.1).

Table 6.1 – Response by household income to – 'How many vehicles does your household have regular access to?' Car

No. of cars	**All**	**Up to £19,999**	**£20,000 to £49,999**	**£50,000+**	**Prefer not to say**
0	19%	42%	15%	5%	23%
1	51%	45%	57%	46%	48%
2	24%	8%	23%	41%	23%
3+	4%	3%	3%	7%	3%
Don`t know	1%	1%	0%	1%	1%
Prefer not to say	1%	1%	1%	0%	3%

Source: Climate Change Perceptions and Actions Survey, Wave 4 2025. Multiple choice. Questions asked of all, 'Don't know' excluded from Household income response. Base = 960 (Up to £19,999 = 172, £20,000 to £49,999 = 427, £50,000+ = 206, Prefer not to say = 155)

6.4 Hybrid vehicles were available to 19% of all households, and electric vehicles available to 9%. 65% of respondents with access to electric cars were able to charge them at home.

6.5 Of households with access to at least one car /van, the availability of hybrid and electric vehicles increased with increasing household income (Table 6.2).

Table 6.2 – Response by household income for households with access to at least one car / van to – 'Of the vehicles your household has access to, how many are electric and/or hybrid?'

Vehicle Type	**All**	**Up to £19,999**	**£20,000 to £49,999**	**£50,000+**	**Prefer not to say**
Hybrid	19%	18%	18%	25%	12%
Electric	9%	4%	9%	14%	3%

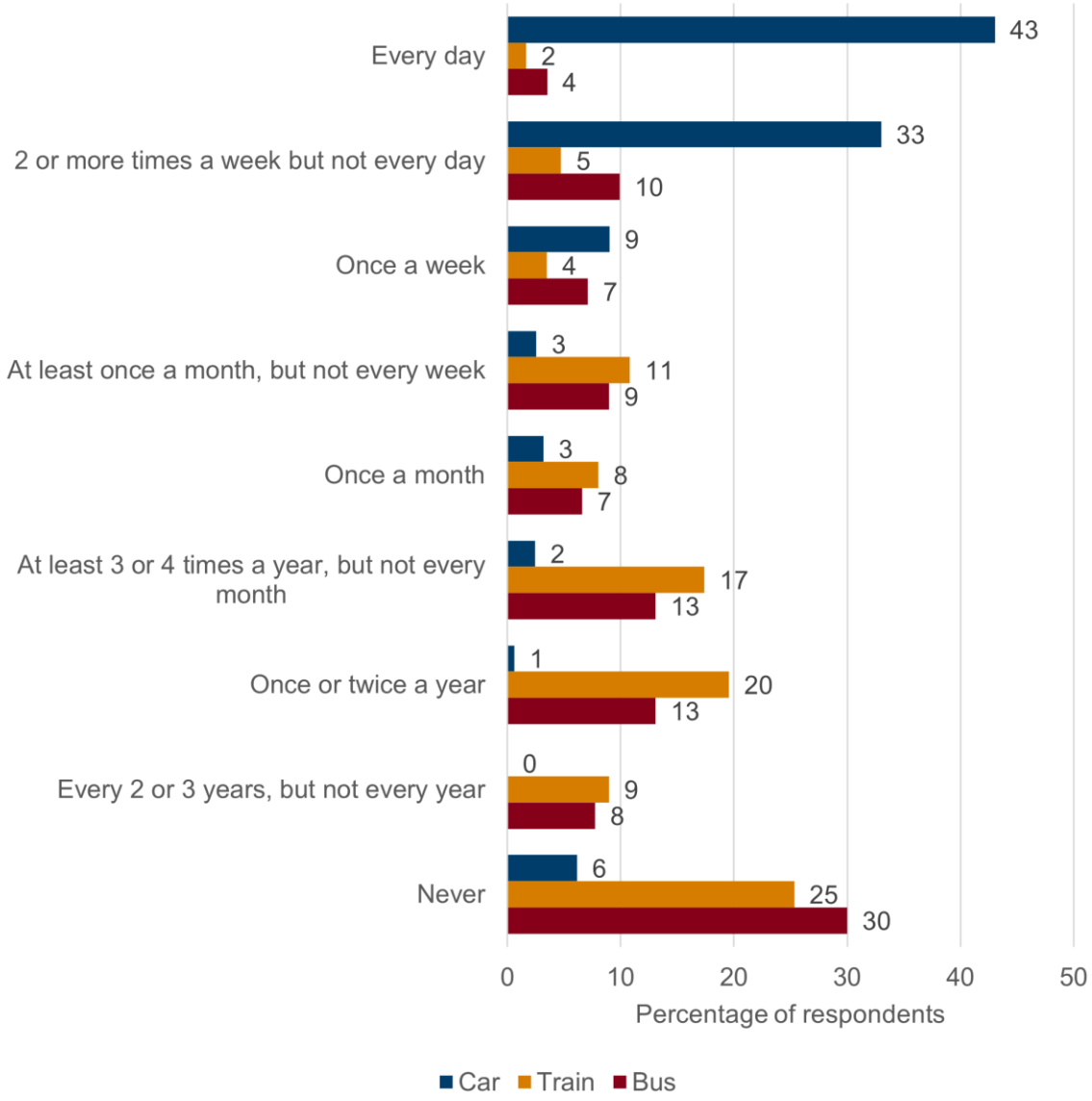
Source: Climate Change Perceptions and Actions Survey, Wave 4 2025. Multiple choice. Questions asked to households with access to at least one car / van. 'Don't know' excluded from Household income response. Base = 727 (Up to £19,999 = 114, £20,000 to £49,999 = 313, £50,000+ = 176, Prefer not to say = 124)

Travel by mode

Car, train and bus

6.6 The frequency of travel by car, train and bus is given in Figure 6.1.

Figure 6.1 – Response to – 'How often do you use each of the following to travel from place to place?'



Description of Figure 6.1: a clustered bar chart showing respondents frequency of travel by car, train and bus.

Source: Climate Change Perceptions and Actions Survey, Wave 4 2025. Multiple choice. Questions asked of all, 'Don't know' and 'Prefer not to say' excluded. Base car = 976, base train = 971, base bus = 970.

6.7 43% of respondents said they used a car every day, with 33% using a car two or more times per week but not every day.

6.8 2% of respondents said they used the train every day, and 5% used the train two or more times per week but not every day. For buses, 4% of respondents used them every day, and 10% used them 2 or more times per week but not every day. 25% of respondents said they never used trains, and 30% of respondents said they never used buses.

Cycling and walking or using a wheelchair

6.9 For cycling (on a standard bicycle), 4% of respondents cycled every day, with 3% cycling 2 or more times per week but not every day, and 4% cycling once per week. 14% of male respondents said they cycled at least once a week, compared to 9% of female respondents (Table 6.3).

Table 6.3 – Response by male and female to – 'How often do you use each of the following to travel from place to place?' Bicycle (standard)

Frequency	All	Female	Male
Every day	4%	3%	6%
2 or more times a week but not every day	3%	2%	4%
Once a week	4%	4%	4%

Source: Climate Change Perceptions and Actions Survey, Wave 4 2025. Multiple choice. Questions asked of all. 'Don't know', 'Other' and 'Prefer not to say' excluded from Male and Female response, 'Don't know' and 'Prefer not to say' excluded from Frequency response. Base = 955 (Male = 454, Female = 501)

6.10 Respondents aged 65 and above said they cycled the least of all age groups, with 80% saying they never cycled (Table 6.4).

Table 6.4 – Response by age to – 'How often do you use each of the following to travel from place to place?' Bicycle (standard)

Frequency	All	18 to 34	35 to 44	45 to 54	55 to 64	65+
Never	68%	63%	68%	52%	71%	80%

Source: Climate Change Perceptions and Actions Survey, Wave 4 2025. Multiple choice. Questions asked of all. 'Prefer not to say' excluded from Age response, 'Don't know' and 'Prefer not to say' excluded from Frequency response. Base = 963 (18 to 34 = 215, 35 to 44 = 170, 45 to 54 = 159, 55 to 64 = 1982, 65+ = 237)

6.11 38% of respondents said they walked every day to travel from place to place (excluding leisure walks such as walking the dog), and 22% walked 2 or more times per week but not every day. 20% of respondents said they never walked from place to place.

Table 6.5 – Response to – 'How often do you use each of the following to travel from place to place?' Walking / using wheelchair

Frequency	**All**
Every day	38%
2 or more times a week but not every day	22%
Once a week	8%
At least once a month, but not every week	3%
Once a month	2%
At least 3 or 4 times a year, but not every month	3%
Once or twice a year	2%
Every 2 or 3 years, but not every year	2%
Never	20%

Source: Climate Change Perceptions and Actions Survey, Wave 4 2025. Multiple choice. Questions asked of all. ''Don't know' and 'Prefer not to say' excluded. Base = 968

Plane

6.12 Respondents were asked how often they travelled by plane, 33% reported using a plane once or twice a year 30% of respondents said they never use a plane to travel and 20% reported using a plane every 2 or 3 years (Table 6.9).

6.13 50% of respondents whose household income was up to £19,999 said they never travelled by plane compared to 14% of respondents whose household income was £50,000 and above. 42% of respondents whose household income was £50,000 and above travelled by plane once or twice a year compared to 17% of respondents whose household income was up to £19,999. For travelling by plane 3 or 4 times per year the same household income group comparison was 17% to 7%.

Table 6.6 – Response by household income to – 'How often do you use each of the following to travel from place to place?' Plane

Frequency	**All**	**Up to £19,999**	**£20,000 to £49,999**	**£50,000+**	**Prefer not to say**
Once per month or more frequent	6%	8%	6%	5%	2%
At least 3 or 4 times a year, but not every month	12%	7%	12%	17%	12%
Once or twice a year	33%	17%	32%	42%	41%
Every 2 or 3 years, but not every year	20%	18%	23%	22%	9%
Never	30%	50%	27%	14%	36%

Source: Climate Change Perceptions and Actions Survey, Wave 4 2025. Multiple choice. Questions asked of all. 'Don't know' excluded from household income response, 'Don't know' and 'Prefer not to say' excluded from Frequency response. Base = *926* (Up to £19,999 = 164, £20,000 to £49,999 = 412, £50,000+ = 205, Prefer not to say = 145)

Sustainable travel action

6.14 Respondents were asked about their travel actions. The sustainable actions were categorised based on their impact on reducing carbon emissions.

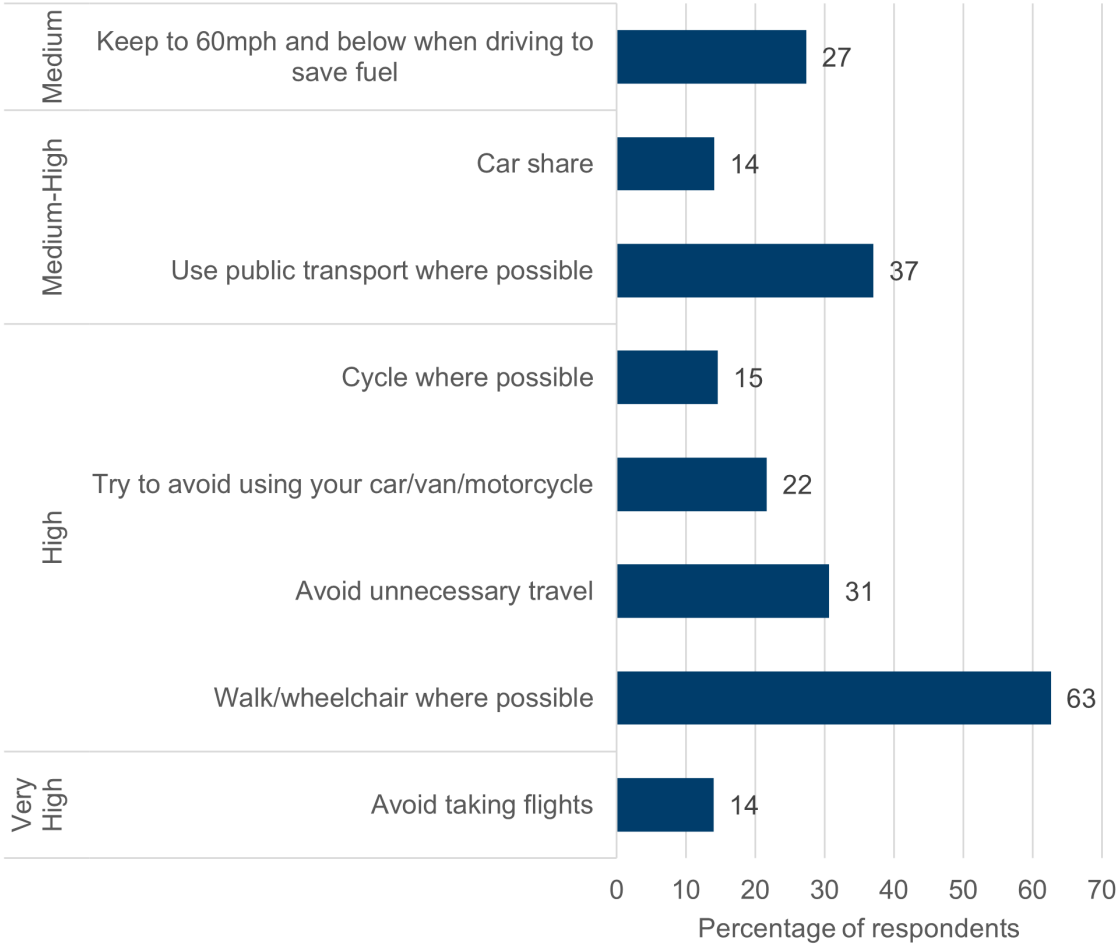
6.15 The impact of the action in terms of reduction in carbon emissions was also categorised into and very high, high, medium-high, and medium impact actions. The very high and high categories involve avoiding using carbon-intensive travel (or taking up active travel instead). Avoiding flying is classified as very high impact as flying is a highly carbon-intensive mode of transport[10]. The medium-high and medium impact actions are classified as such because they still involve using some kind of transportation that would result in carbon emissions[11].

6.16 The most commonly reported sustainable action undertaken was walking or using a wheelchair where possible (63% of respondents, high impact action) followed by using public transport where possible (37% of respondents, medium-high impact action), and avoiding unnecessary travel (31% of respondents, high impact action) (Figure 6.2).

6.17 The least common sustainable actions were car sharing (14% of respondents, medium-high impact action), cycling where possible (15% of respondents, high impact action), and avoiding taking flights (14% of respondents, very high impact action).

[10] Hannah Ritchie (2024) - "What share of global CO_2 emissions come from aviation?" Our World in Data
[11] Hannah Ritchie (2023) - "Which form of transport has the smallest carbon footprint?" Our World in Data

Figure 6.2 – Response to – 'Do you do any of the following when travelling from place to place?'



Description of Figure 6.2: a bar chart showing proportion of respondents undertaking sustainable travel actions.

Source: Climate Change Perceptions and Actions Survey, Wave 4 2025. Multiple choice. Questions asked of all, no exclusions. Base = 1,001

6.18 Comparing the sustainable actions by the respondents' response to what they thought climate change was caused by, shows that the respondents who said climate change was caused 'entirely or mainly by human activity' were undertaking a slightly higher number of actions than all other respondents (Table 6.7).

Table 6.7 – Response by cause of climate change to - 'Do you do any of the following when travelling from place to place?'

Response	Very High / High Impact (average out of 5)	Medium-High / Medium Impact (average out of 3)
I don't think climate change is happening	1.0*	0.5*
Entirely/mainly by natural processes	1.3	0.7
About equally by natural processes and human activity	1.2	0.9
Entirely / mainly by human activity	1.7	0.9
All	1.5	0.8

Source: Climate Change Perceptions and Actions Survey, Wave 4 2025. Multiple choice. Questions asked of all., None of the above' and 'Prefer not to say' excluded from sustainable action response. Base = 958 (I don't think climate change is happening = 24, Entirely/mainly by natural processes= 198, About equally by natural processes and human activity = 201, Entirely / mainly by human activity= 535)

* Base size fewer than 30 respondents. Results should be interpreted with caution.

6.19 Comparing the sustainable actions by the respondents' response to how much they thought climate change was a problem, shows that the respondents who said climate change is a serious problem were undertaking more sustainable travel actions than those who thought it was not a serious problem (Table 6.8).

Table 6.8 – Response by extent of climate change as a problem - 'Do you do any of the following when travelling from place to place?'

Response	Very High / High Impact (average out of 5)	Medium-High / Medium Impact (average out of 3)
1-2 Not serious	0.9	0.3
3-5	1.1	0.5
6-8	1.4	0.8
9-10 Extremely serious	1.9	1.0
All	1.5	0.8

Source: Climate Change Perceptions and Actions Survey, Wave 4 2025. Multiple choice. Questions asked of all. None of the above' and 'Prefer not to say' excluded from sustainable behaviour response. Base = 965 (9-10 Extremely serious = 305, 6-8 = 442, 3-5 = 147, 1-2 Not serious = 71))

6.20 Comparing the sustainable travel actions by the level respondents' reported that they worry about climate change, shows that the respondents who were 'very' or 'fairly' worried about climate change were undertaking more sustainable actions than those who are not very or not at all worried.

6.21 The average number of actions undertaken by respondents who said they were very or fairly worried about climate change was 1.6 (out of 5) for very high / high

impact actions and 0.8 (out of 3) for medium-high / medium impact actions (Table 6.9). For respondents who said they were not very or not at all worried by climate change the average number of actions was slightly lower, 1.2 for high / high impact, and 0.5 for medium-high / medium impact actions.

Table 6.9 – Response by worry about climate change to - 'Do you do any of the following when travelling from place to place?'

Response	Very High / High Impact (average out of 5)	Medium-High / Medium Impact (average out of 3)
Not Very / Not at all worried	1.2	0.5
Very / Fairly worried	1.6	0.9
All	1.5	0.8

Source: Climate Change Perceptions and Actions Survey, Wave 4 2025. Multiple choice. Questions asked of all. 'None of the above' and 'Prefer not to say' excluded from sustainable action response. Base = 954 (Not Very / Not at all worried = 295, Very / Fairly worried = 659).

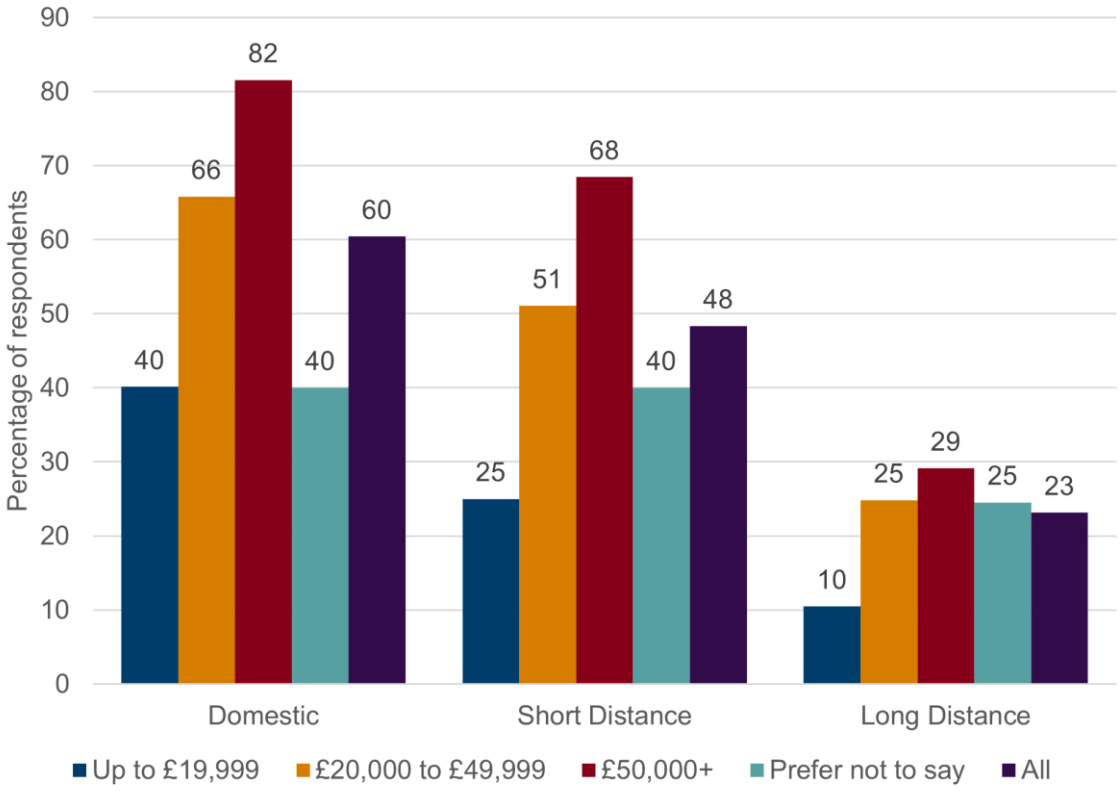
Holiday travel

6.22 Respondents were asked how many domestic, short distance and long-distance holidays they had taken in the last 12 months. Domestic holidays are holidays in Wales / UK, short distance holidays are foreign holidays to Europe, and long distance holidays are foreign holidays to places like US, India, Africa and Australia. It is assumed that flights are only required for short and long distance holidays.

6.23 Respondents whose household income was £50,000 and above had taken more holidays of each type in the last 12 months than respondents from other household income groups. 68% of respondents whose household income was £50,000 and above, had at least one short distance holiday, compared to 51% of respondents with household income £20,000 to £49,999, and 25% of respondents with household income less than £19,999 (Figure 6.3).

6.24 Overall, fewer respondents reported taking long-distance holidays in the past 12 months than domestic or short-distance holidays. A greater proportion of respondents whose household income was more then £50,000 reported taking long-distance holidays (29%) than other income groups (25% and 10%).

Figure 6.3 – Response by household income to – 'In the past 12 months, how many of the following types of holidays, if any, have you taken?'



Description of Figure 6.3: a clustered column chart showing proportion of respondents by household income taking domestic, short distance and long-distance holidays.

Source: Climate Change Perceptions and Actions Survey, Wave 4 2025. Multiple choice. Questions asked of all. 'Don't know' excluded from Household income response. Base = 960 (Up to £19,999 = 172, £20,000 to £49,999 = 427, £50,000+ = 206, Prefer not to say = 155)

6.25 For domestic holidays, 77% of respondents did not travel by plane to reach their holiday destination. For short distance holidays,12% of respondents did not travel by plane (Table 6.10).

Table 6.10 – Response to - 'Of the holidays you have taken in the past 12 months, how many did you reach by flying?'

Response	Domestic holidays	Short distance holidays	Long distance holidays
None	77%	12%	9%
One	19%	56%	67%
Two	2%	22%	16%
Three or more	2%	11%	8%

Source: Climate Change Perceptions and Actions Survey, Wave 4 2025. Multiple choice. Questions asked of all. 'Don't know' and 'Prefer not to say' excluded from response. Base Domestic = 601, Base Short Distance = 480, Base Long Distance = 231.

Travel: Summary

6.26 Respondents were asked about travel actions.

6.27 The majority of households had access to at least one vehicle, with 51% having access to one car and 24% having access to two cars. However, 19% of households did not have access to a car. Hybrid vehicles were available to 19% of households, and electric vehicles to 9%.

6.28 43% of respondents used a car every day, while only 2% used the train every day and 4% used buses every day. Walking was a common mode of travel, with 45% of respondents walking every day.

6.29 Respondents engaged in various sustainable travel actions, such as walking where possible (63%) and using public transport (37%).

6.30 Respondents who believed climate change was caused by human activity, thought it was a serious problem, and were worried about it, were slightly more likely to undertake sustainable travel behaviours.

6.31 A greater proportion of respondents with higher household incomes took holidays in the last 12 months compared to those with lower incomes. 68% of respondents whose household income was £50,000 and above had at least one short distance holiday, 29% had at least one long distance holiday.

7. Conclusion

7.1 The third quantitative survey of six waves was undertaken in August and September 2024. A dataset was collected that was broadly representative of the population of Wales.

7.2 Survey outputs have been detailed within this report, highlighting any sub-groups of the population with differing attitudes or behaviours to certain questions. The wave 4 comparison report compares the outputs to previous and subsequent waves and identifies any changes in attitudes or behaviours.

7.3 Respondents were asked about their perceptions and attitudes towards climate change, home energy use, food consumption, daily life habits, and travel.

7.4 Most respondents attribute climate change to human activity and express concern, but those aged 65+ and above are slightly less worried than other age groups. Of societal groups, businesses and non-UK countries are seen as least active in addressing climate change.

7.5 While 66% of respondents have smart meters, less than half use them regularly. Nearly all take some energy-saving steps, favouring lower impact measures. Higher-income households adopt more energy-efficient technologies, and those concerned about climate change engage more in energy-saving actions.

7.6 Dairy was the most regularly consumed food product in comparison to fruit and vegetables, white meat, read meat, and fish or seafood. The most common dietary change was reduction with many reducing red meat intake. Food waste is common, and lower impact sustainable food actions are more prevalent than higher impact ones. Respondents who stated that they were highly concerned about climate change more frequently adopted sustainable food actions.

7.7 Common sustainable daily actions include donating, recycling, and using reusable products, with higher-income and urban residents more engaged.

7.8 79% of households have access to at least one vehicle, with hybrid vehicles available to 19% of all households, and electric vehicles available to 9%. 43% of respondents use a car every day. A greater proportion of respondents with higher household reported taking holidays including air travel more often compared to those with lower incomes. 68% of respondents whose household income was £50,000 and above had at least one short distance holiday, and 29% had at least

one long distance holiday. Participants stating that they were highly concerned about climate change undertook more sustainable travel actions.

7.9 Across the home energy, travel and food sustainable action categories, respondents who recognised human impact in climate change, thought climate change was a problem and were concerned about climate change, undertook more impactful actions than other respondents. This finding was less pronounced for daily life sustainable actions where many higher impact actions were also undertaken by respondents who did not recognise human impact in climate change.

7.10 Several methodological and analytical considerations may impact the interpretation of the findings. These are outlined in the 'limitations and reflections' section of the Wave 3 & 4 Methodology Report.

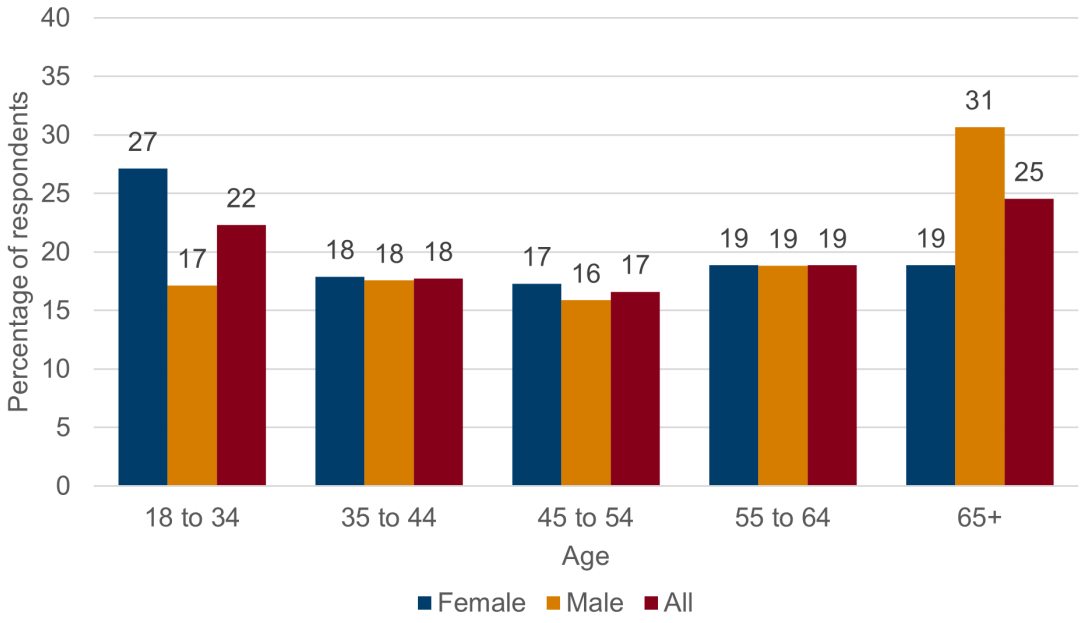
Annex A – Wave 4 demographic data

This Annex breaks down the Wave 4 demographic data further identifying relationships between the different demographic characteristics.

Age and Male and Female

The response to age and male and female was broadly in line with 2021 census data for Wales. The combination of these categories shows that female respondents tended to be younger than male respondents (Figure A.1). 45% of female respondents were aged 44 or under compared with 35% of male respondents, whereas 31% of male respondents were over 65, compared to 19% of female respondents.

Figure A.1 – Response by male and female to - 'What age group do you fall into?'



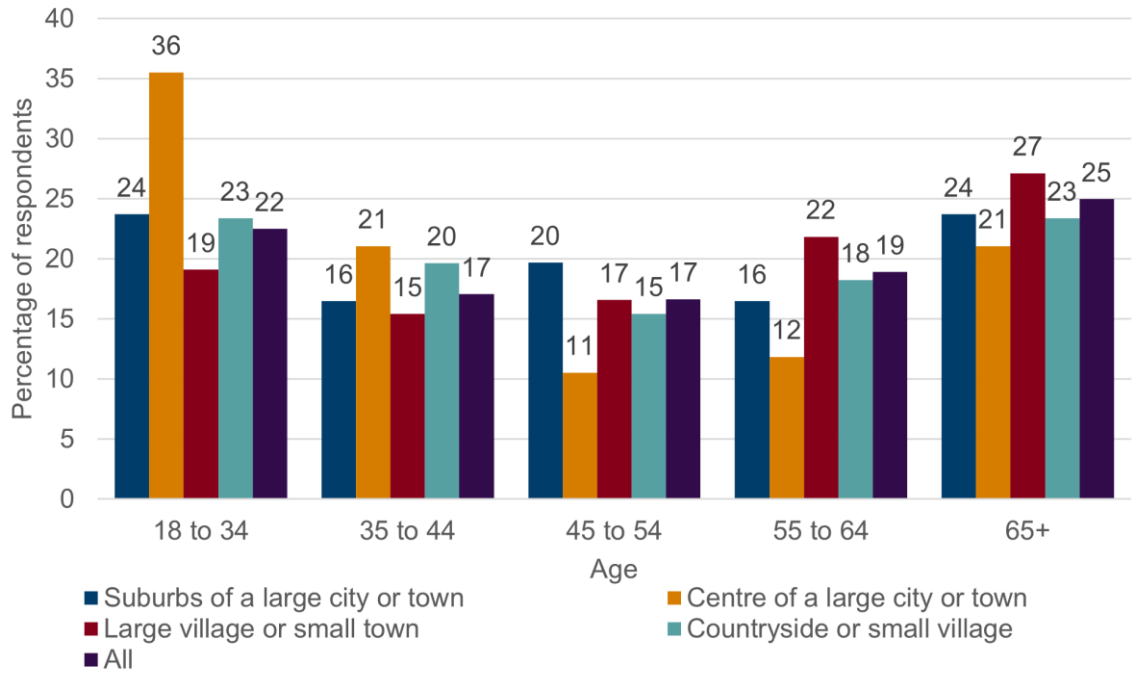
Description of Figure A.1: a clustered column chart showing proportion of respondents by age and gender.

Source: Climate Change Perceptions and Actions Survey, Wave 4 2025. Multiple choice. Questions asked of all. 'Don't know' and 'Prefer not to say' excluded. Base = 982 (Female = 509, Male = 473)

Age and Area Type

Respondents were asked to indicate the area type in which they lived. Respondents who lived in the centre of large towns or cities tend to be younger than those who lived in other areas. 36% of respondents who lived in the centre of a large city or town were aged between 18 and 34, compared with 21% of respondents aged 65 and over (Figure A.2).

Figure A.2 –Response by area type to - ‘What age group do you fall into?’



Description of Figure A.2: a clustered column chart showing proportion of respondents by age and area type.

Source: Climate Change Perceptions and Actions Survey, Wave 4 2025. Multiple choice. Questions asked of all. ‘Don’t know’ and ‘Prefer not to say’ excluded. Base = 974 (Suburbs = 249, Centre = 76, Large Village = 435, Countryside = 214)

Occupation and Area Type

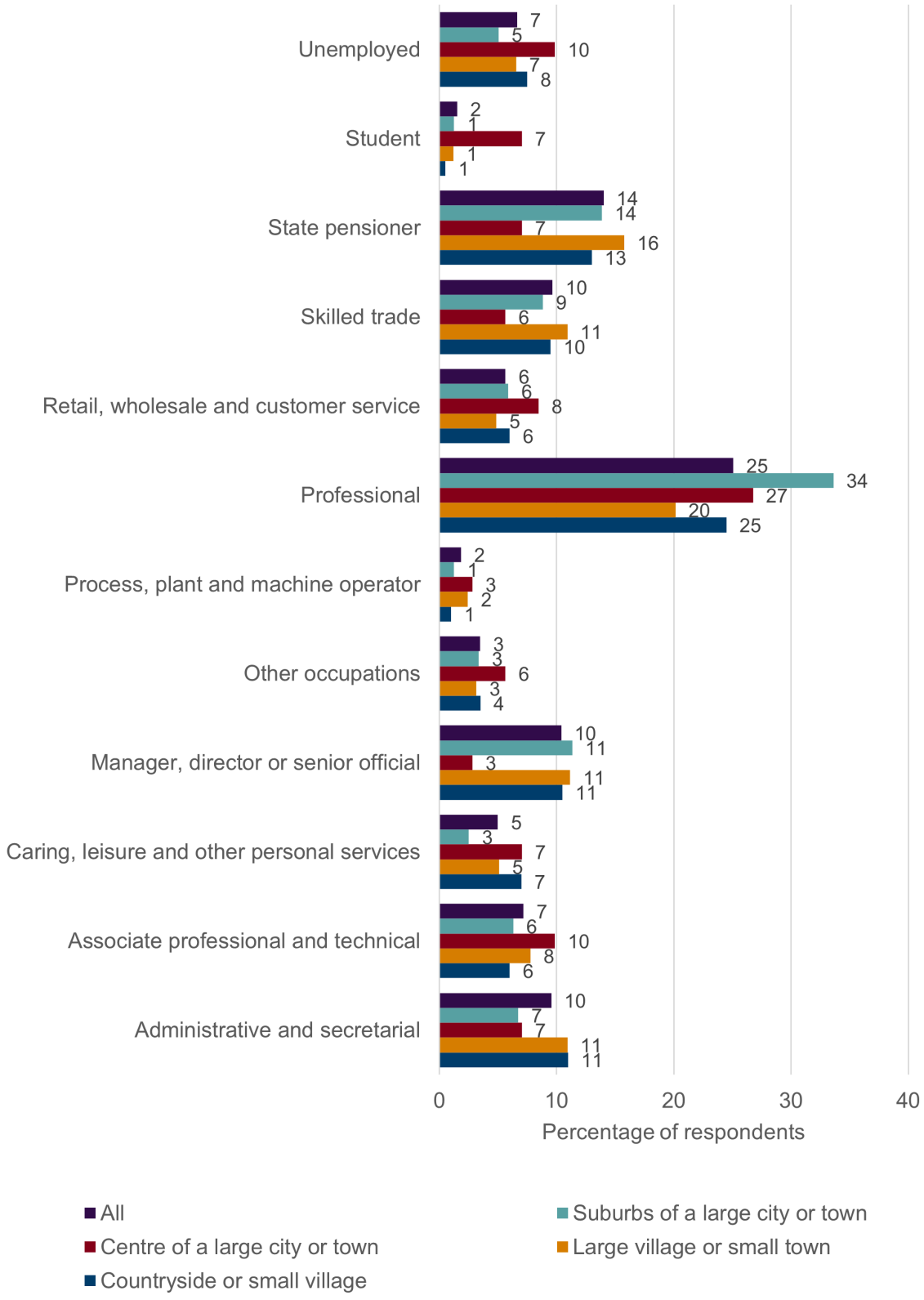
Respondents were asked what occupational group the main income earner in the household belonged to.

Across all area types respondents most commonly reported that they belong to the professional occupation group, the area type with the highest proportion of respondents reporting belong to the this group was the suburbs of a large city or town (34%) (Figure A.3).

Across all area types respondents least frequently reported belonging to the student and process, plant and machine occupational groups.

The distribution of occupational group and area type is fairly even across most groups, with the exception of students and retail workers respondents who more commonly reported living in the centre of a large city or town (7% and 8% respectively). Those reporting belonging to the manager, director or senior official occupational group reported living in the centre of a large city or town less frequently than other area types (3% compared to 11% in all other area types).

Figure A.3 – Response by area type to – 'Please indicate which occupational group the chief income earner (the person with the largest income) in your household belongs to'



Description of Figure A.3: a clustered bar chart showing proportion of respondents by occupation and area type.

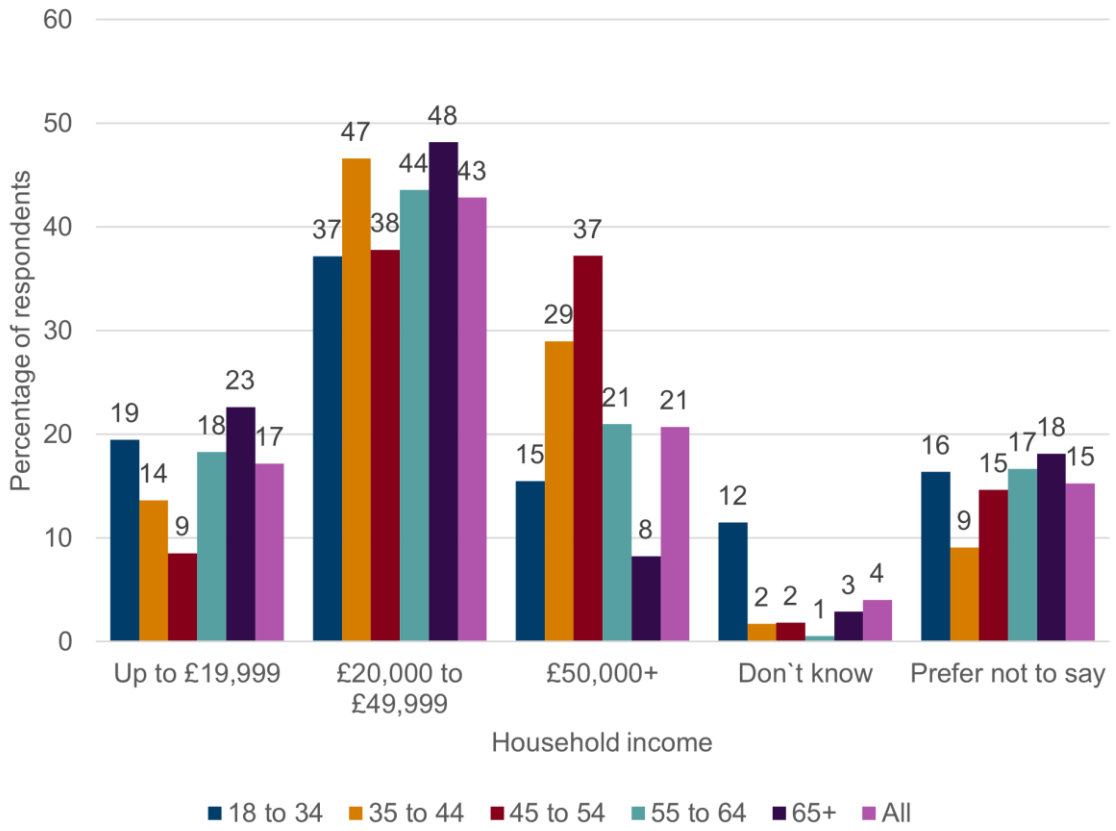
Source: Climate Change Perceptions and Actions Survey, Wave 4 2025. Multiple choice. Questions asked of all. ‘Don’t know’ ‘Other / not applicable’ and ‘Prefer not to say’ excluded. Base = 921 (Suburbs = 238, Centre = 71, Large Village = 412, Countryside = 200)

Income and Age

Respondents were asked their annual household income per year before tax and any other deductions. Just under a fifth of respondents did not give a range for their household income, 15% selected “Prefer not to say” and 4% selected “Don’t know” (Figure A.4).

Older respondents were less likely to state their household income. 18% of respondents aged 65 and above preferred not to state their household income. Respondents aged between 18 and 34 were more likely to say they did not know the household income (12%) compared to respondents in other age groups.

Figure A.4 – Response by age to – ‘Please indicate the approximate income of your household per year (before tax and any other deductions)?



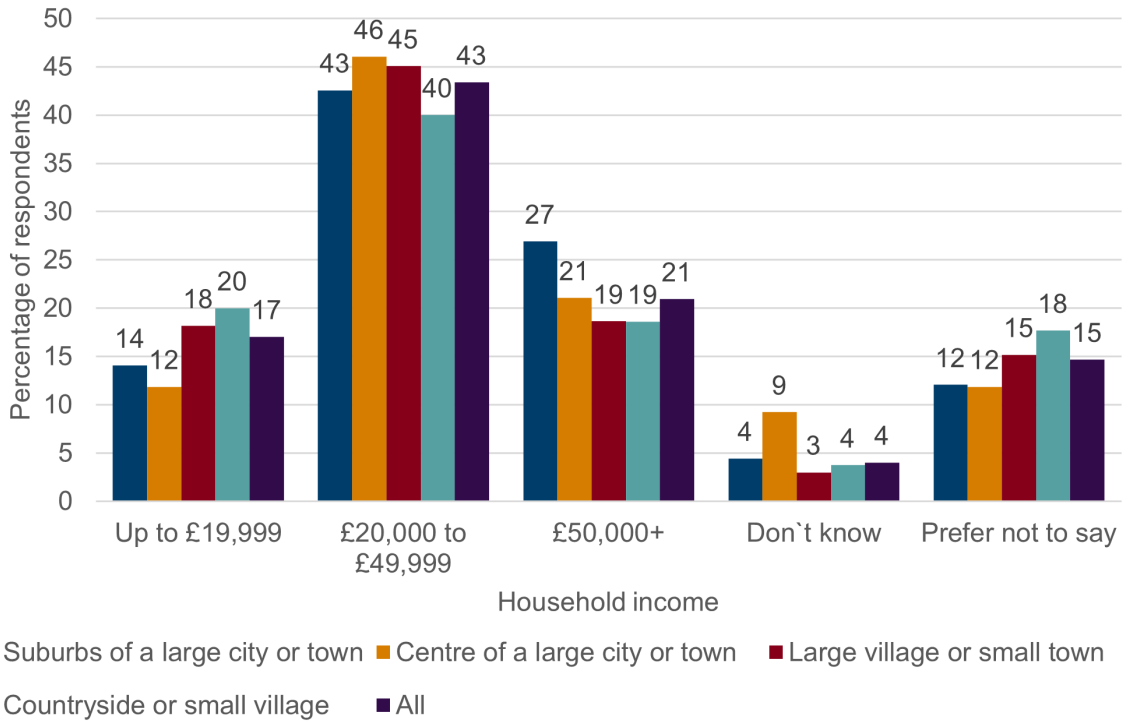
Description of Figure A.4: a clustered column chart showing proportion of respondents by household income and age.

Source: Climate Change Perceptions and Actions Survey, Wave 4 2025. Multiple choice. Questions asked of all. ‘Prefer not to say’ excluded from age response. Base = 995 (18 to 34 = 226, 35 to 44 = 176, 45 to 54 = 164, 55 to 64 = 186, 65+ = 243)

Income and Area Type

Examining household income by area type (Figure A.5) shows that respondents living in the countryside or small village were more likely to not state their household income (18%) compared to respondents living in other area types. The suburbs of a large city or town (27%) and the centre of a large city or town (21%) were the area types with the highest proportion of respondents with household income of £50,000 and above.

Figure A.5 – Response by area type to - 'Please indicate the approximate income of your household per year (before tax and any other deductions)?'



Description of Figure A.5: a clustered column chart showing proportion of respondents by household income and age.

Source: Climate Change Perceptions and Actions Survey, Wave 4 2025. Multiple choice. Questions asked of all. 'Don't know' and 'Prefer not to say' excluded from area type response. Base = 975 (Suburbs = 249, Centre = 76, Large Village = 435, Countryside = 215)

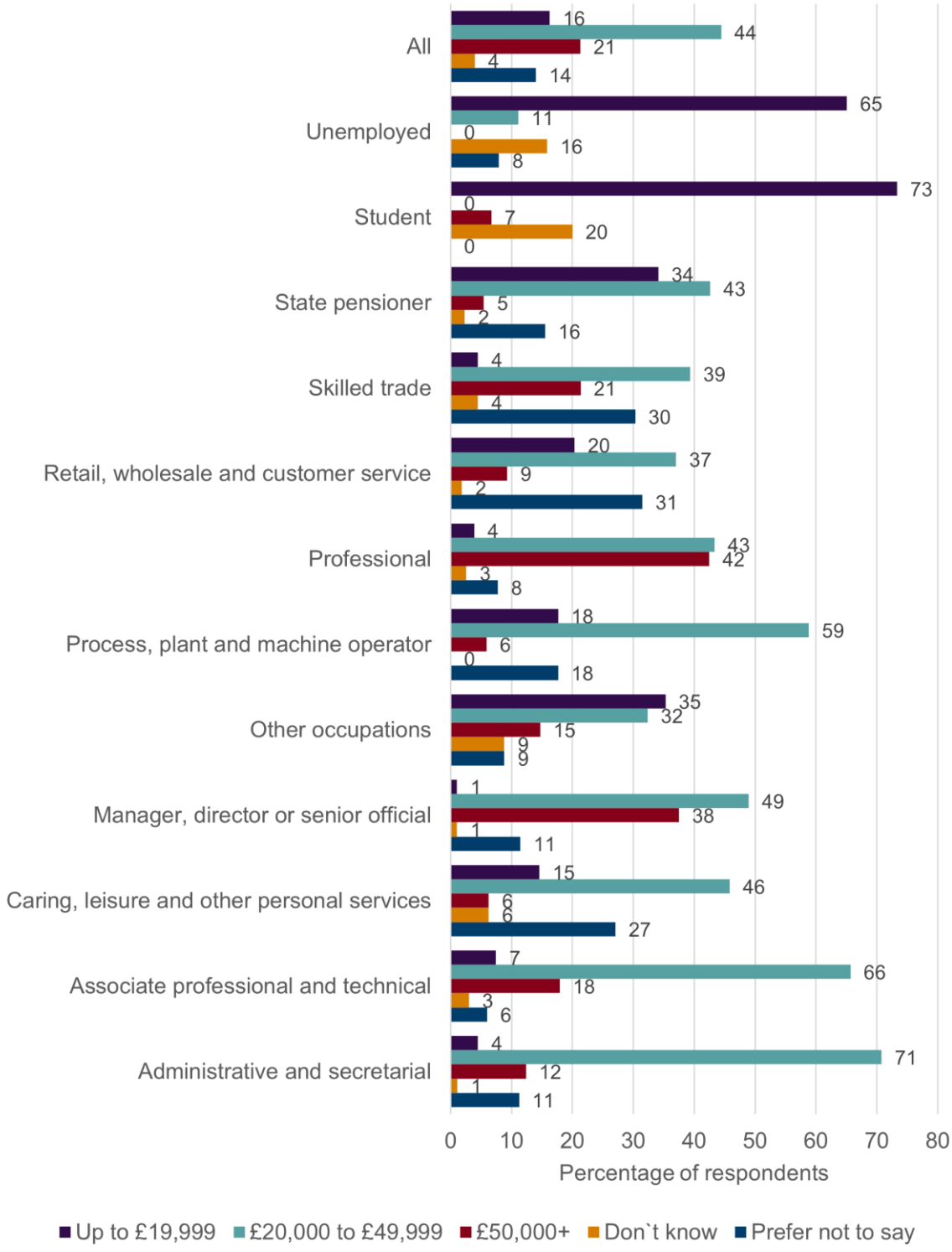
Occupation and Income

The majority of respondents from each occupational group stated their income. Retail, wholesale and customer service (31%) and skilled trade (30%) respondents were more likely not to state their household income than respondents with any other occupation (Figure A.6).

Other than unemployed and student respondents, 'other occupations' had the highest proportion of respondents with a household income up to £19,999 (35%).

Professional had the highest proportion of respondents with a household income above £50,000 (42%).

Figure A.6 – Response by occupation to - 'Please indicate the approximate income of your household per year (before tax and any other deductions)?'



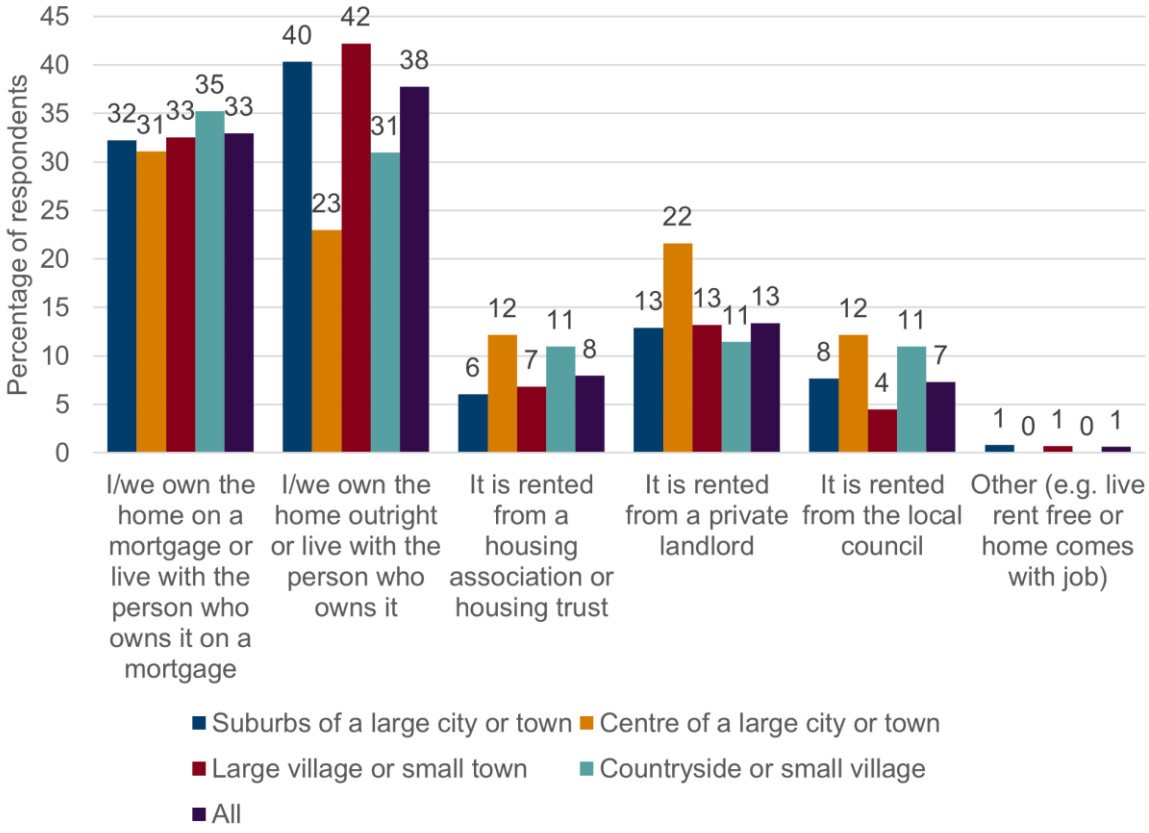
Description of Figure A.6: a clustered bar chart showing proportion of respondents by occupation and household income.

Source: Climate Change Perceptions and Actions Survey, Wave 4 2025. Multiple choice. Questions asked of all. 'Don't know' 'Other / not applicable' and 'Prefer not to say' excluded from occupation response. Base = 878 (Admin = 100, Associate = 58, Caring = 36, Manager = 84, Other = 50, Process = 21, Professional = 220, Retail = 55, Skilled = 99, Pensioner = 92, Student = 28, Unemployed = 35)

Tenure and Area Type

Respondents were asked if the household owned or rented their accommodation. The combination of tenure and area type shows that a greater proportion of respondents in large village or small town (75%) or suburbs of large city or town (72%) owned their home outright or lived with the person who does compared to other areas (Figure A.7). Respondents living in the centre of cities or towns were more likely to be renting from a private landlord than respondents in other area types.

Figure A.7 – Response by area type to – 'Does your household own or rent your accommodation?'



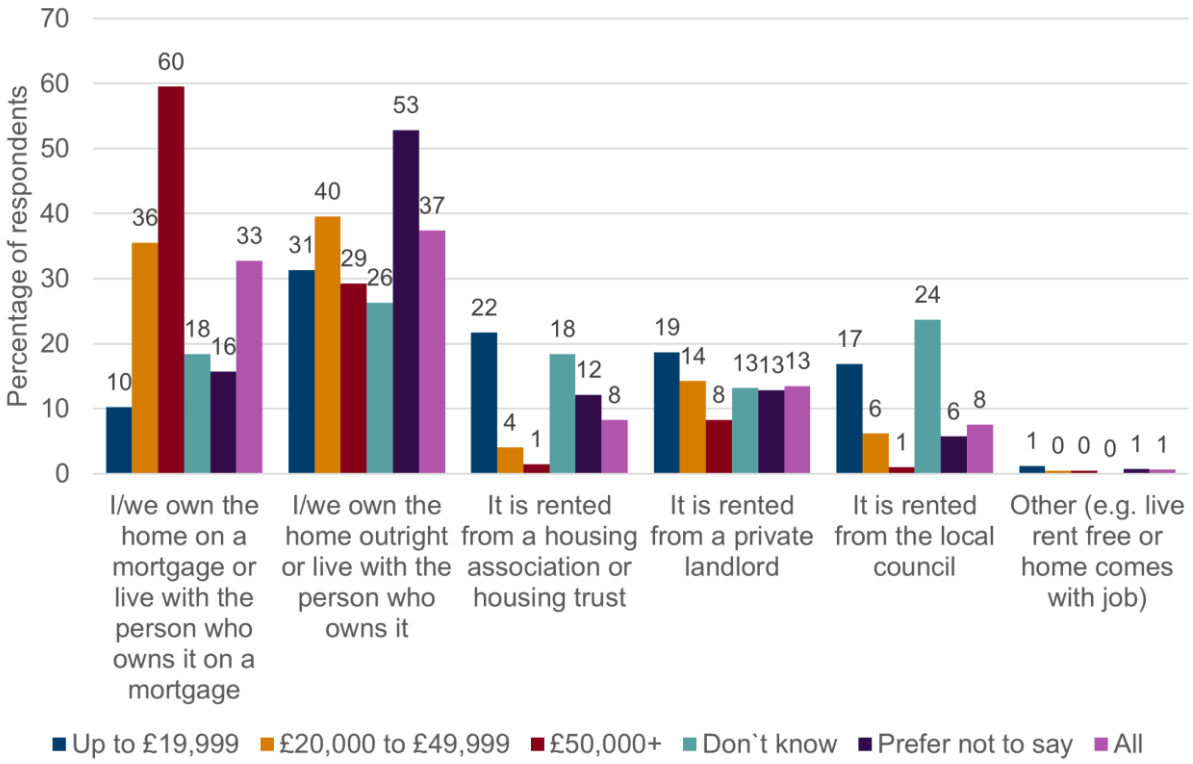
Description of Figure A.7: a clustered column chart showing proportion of respondents by tenure and area type.

Source: Climate Change Perceptions and Actions Survey, Wave 4 2025. Multiple choice. Questions asked of all. 'Don't know' and 'Prefer not to say' excluded. Base = 956 (Suburbs = 248, Centre = 74, Large Village = 424, Countryside = 210)

Tenure and Income

The combination of tenure and household income shows that respondents who were renting were more likely to have a household income of up to £19,999, 58% (Figure A.8) compared to the other household incomes. 89% of respondents with a household income of £50,000 and above owned the home outright or owned the home on a mortgage, 53% of respondents who did not state their household income owned the home outright or lived with the person who owned it.

Figure A.8 – Response by household income to – 'Does your household own or rent your accommodation?'



Description of Figure A.8: a clustered column chart showing proportion of respondents by tenure and household income.

Source: Climate Change Perceptions and Actions Survey, Wave 4 2025. Multiple choice. Questions asked of all. 'Don't know' and 'Prefer not to say' excluded from Tenure response. Base = 971 (Up to £19,999 = 166, £20,000 to £49,999 = 422, £50,000+ = 205, Don't know = 38, Prefer not to say = 140)

Demographic Patterns: Summary

To summarise the key findings on the characteristics of the survey respondents of Wave 4:

- Female survey respondents were younger than male survey respondents. Younger respondents tended to live in the centre of a large city or town, whilst older respondents tended to live in the countryside or a small village.

- The suburbs of a large city or town was the area type with the highest proportion of respondents with a professional occupation. .
- A large proportion of respondents did not state their household income. This group tended to be older and own their home outright.